

About the job



About Litman Gregory and iM Global Partner

Litman Gregory, based in the San Francisco Bay area, recently joined iM Global Partner, a worldwide asset management network. Founded in 1987, Litman Gregory offers mutual funds, wealth management, and research services all driven by strong asset allocation and manager selection expertise.

iM Global Partner has built a global network of relationships built on trust, respect, and integrity with success shared among all. Excellence and quality are core to our values, and interactions are driven by human connection. We believe that 'Performance is born out of people' and that is clearly the case for our team of hard-working, motivated employees, based in 16 locations worldwide. Litman Gregory is now part of this young multi-national company which is growing fast. And as we grow, so will you. We believe that our company provides an important opportunity for people to expand their skill set and make their mark.

We have very high standards for our work and our investments are for the long term. This philosophy is reflected in our hiring process. We work hard to find the right fit and as a result we have a team of high performing, motivated and creative individuals.

The role

We are seeking an **Associate - Investment Analytics** to join our team in Walnut Creek. Your chief responsibilities will be to create reliable and accurate reports on performance of the PartnerSelect mutual funds and portfolios, as well as to provide analytical support to our investment research and portfolio management process.

Main responsibilities

- Create routine daily, monthly, quarterly, and annual performance and risk-related reports and updates for mutual-fund, model portfolio, and research publishing businesses.
- Support Portfolio Management team members in conducting manager, asset class and macroeconomic research and analysis
- Create ad-hoc reports and provide quantitative support for mutual fund sales consulting, Portfolio Strategies, Advisor Intelligence, or other internal teams.
- Read and audit reports to ensure data accuracy and reliability, based on solid grasp of the meaning, usage, and context of the reports created.
- Leverage technology to create efficiency and add value to reports.
- Provide administrative support to internal client teams, as needed.
- May assist in conducting trades (for example, entering transactions, updating portfolio models, etc)

Skills and experience

Essential

- Strong quantitative and analytical abilities to understand various data fields, data sources, and related calculations.

- Excellent attention to detail and concern for data integrity.
- Ability to work collaboratively with colleagues to create a results-driven, team-orientated environment.
- Highly proficient in Microsoft Excel, including use of formulas, pivot tables, and charting functions. Solid skills in Microsoft Office Suite, including PowerPoint, Outlook, and Word.
- Professional, focused, and disciplined approach to work responsibilities. Able to quickly learn and follow reporting and quality control processes. Ability to work in a time-sensitive environment and balance competing priorities.
- Demonstrated ability to work both independently and as part of a team. Flexible towards coworkers and adaptable as work priorities change.
- Written and oral communication skills to fully understand end user requests and ad-hoc assignments. Ability to ask questions and explain technical information.

Desirable

- 1 year related work experience preferred.
- Bachelor's degree in a related field preferred
- Working knowledge of financial markets, investment vehicles and financial reporting preferred

Location

This role will be located in our Walnut Creek, CA office.

We are an equal opportunity employer. We celebrate diversity and are committed to creating an inclusive environment for all employees. We encourage applications from people of all races, religions, national origins, genders, sexual orientations, gender identities, gender expressions, and ages, as well as veterans and individuals with disabilities.

If you are ready to join a team focused on excellence and ready to reap the rewards that come with it, then we invite you to apply with your resume and a short cover letter to **recruiter@lgam.com**