

INVESTMENT OPERATIONS SPECIALIST

Meyer Capital Management

Overview:

Meyer Capital Management (MCM) is seeking a full-time Investment Operations Specialist to join our team. If you have a working knowledge of investing in the capital markets, and enjoy supporting the investment management process, then we would love to talk with you. The Investment Operations Specialist is an entry-level investment team position involving a broad mix of investment management tasks, research support, and trading operations. Responsible for supporting a team of portfolio managers, this professional will develop presentation materials for client portfolio reviews, serve as secondary securities trader across all asset classes, and support the securities research process. This team member also provides overall office/team support to ensure a high quality work environment.

Why MCM?

Join a team that makes a positive impact in the lives of private clients through the effective management of their personal financial assets. This is both an honor and a responsibility that we take very seriously, and we approach each client with personalized service unique to them. Your support will directly help our team and clients flourish as our business continues to grow. We work hard, but also support a healthy work/life balance. To that end, we provide a competitive total rewards package that includes comprehensive health insurance, profit-sharing/401(k), paid time off, etc. Below are a few other benefits of working at MCM:

- Informal team social every Friday afternoon
- Small and supportive team-based environment
- Active involvement in the local community
- As a growing 6-person company, every role has a valuable impact on high-level, strategic company goals
- Progressive performance management practices with ongoing feedback and individualized incentive plans

Key Responsibilities:

- Client meeting preparation
- Monitoring MCM master portfolio
- Trading support
- Assisting with investment research
- Contributing to MCM's social media presence

Position Summary:

- Creating exhibits for client presentations using Microsoft Excel, Word, and PowerPoint
- Preparing updates for portfolio managers regarding material economic data, company earnings reports, and credit upgrades/downgrades
- Update/refine research templates on a daily/weekly/monthly/quarterly basis
- Support trading activity regarding trade entry, execution, allocation and compliance
- Respond to internal queries regarding specific holdings and other market related data
- Collaborate with others in crafting MCM's monthly newsletter and social media presence

Minimum Qualifications:

- 4-year Bachelor's Degree: Business, Finance, or related field preferred
- Working knowledge of financial terms and concepts

Desired Competencies:

- Service-oriented mindset
- Skilled with data-based reasoning
- Curiosity and a desire for broad based reading
- Ability to adapt quickly in a continually changing financial services environment
- Committed to integrity and dedicated to high quality standards
- Comfortable working collaboratively as well as independently
- Strong interpersonal skills
- Robust written communication skills

How To Apply:

Please submit cover letter and resume to Maggie Frye at maggie.frye@contact-core.com.