



## **Investment Analyst Intern**

**Reports to:** COO

**Benefits:** No

**Status:** Part-time; Non-Exempt

**Hours:** 15 hours per week

We are a wealth management firm and since 1982, we've provided personal, proactive advice to high-net-worth clients seeking a better life for themselves, their loved ones, and generations yet to come. Today, we proudly serve clients near our Reno office and original Southern California location, as well as various other parts of the country. We believe that true wealth comes from four capitals. What good is money without the health to enjoy it? The knowledge to protect and grow it? The peace of mind to share it? At SFG, we care as much about our clients dreams as their dollars. That's why we seek to integrate many aspects of their life into one plan that addresses their four capital needs – financial, physical, psychological, and intellectual. We call this approach Integrative Personal Planning.

**Position Overview:** The Investment Analyst Intern is responsible for accurate and timely data collection from various web-based databases. The Investment Analyst Intern is also responsible for assisting in client meeting preparation. This position will also assist with mutual fund due diligence and the monitoring of existing assets.

### **Duties & Responsibilities**

Under the supervision of the CIO, the Investment Analyst Intern is responsible for performing the following tasks:

- Assist in the research and monitoring of existing assets.
  - Fund Manager Analysis – Update and monitor performance of investment managers; perform analysis of investment manager performance as well as holdings and exposure; and perform analysis of worst-case scenarios.
  - Client-specific Portfolio Analysis – Analyze specific investments that clients hold as well as specific asset class or strategy that clients have; run risk analysis/stress tests to evaluate risk exposure; and perform worst-case scenario analysis on client portfolios.
- Assist with client meeting preparation.
  - Perform risk/stress testing analysis of investments and Client Investment Portfolio's under different economic scenarios.
- Assist with Mutual Fund Due Diligence.
  - Gather all required content and information on the fund under due diligence. Review and analyze all information collected and provide a detailed write-up.
- Assist with data collection.
  - Collect and verify data collected from various databases. After verification, apply the database into our data model for tabulation. Verify that the database has been entered correctly and that there are no errors.

- Assist with special investment-related projects.
- Uphold the firm's purpose, vision and values; incorporate the SFG Core Beliefs of Service Heart, Innovation, and Client Commitment in the way in which all aspects of work are approached.

#### **Qualifications**

- Pursuing a bachelor's degree in finance or economics.
- Proficiency in Microsoft Office with advanced Excel skills.

#### **Other Skills & Experience**

- Continuously exhibits personal integrity and professional initiative.
- Reliable, follows through on commitments, does not shrink from new challenges.
- Possesses a passion to help new and existing clients; has a keen understanding of truly stellar service to both internal and external clients.
- Solid strategic thinker, creative problem solver and competent decision maker.
- Must be organized, detail-oriented and able to continuously reprioritize tasks.
- Demonstrates a commitment to accuracy by delivering high quality work.
- Has strong interpersonal, verbal and written communication skills.
- Collaborative and able to work effectively with others.
- Flexible team player who is highly adaptable to change and open to new ideas.
- Demonstrates ability to work successfully in an entrepreneurial, small company environment.

**Interested candidates should submit a cover letter and resume to [info@sfginc.com](mailto:info@sfginc.com).**