



Research Analyst

BT Wealth Management is an independent, fee-only Registered Investment Advisor that provides comprehensive investment management and financial planning services to high-net-worth individuals and families. We take pride in our culture and are looking to build on it by adding a talented individual looking to be part of a dynamic, growing wealth management firm.

The Investment Analyst position will offer immediate exposure to a wide variety of investment strategies and asset classes, across public and private markets. The Investment Analyst will be an essential part of the BTWM team and report directly to the Director of Research. It requires strong research capabilities, attention to detail, a positive attitude, and a willingness to learn. This position is located in Atlanta, GA.

Responsibilities

- Assist with initial and ongoing due diligence across the investment platform
- Track management communications, meetings, document reviews, analytics, reports, and other activities
- Assist in the design and implementation of the asset allocation process
- Perform economic research, track market data, compare relative value across markets
- Work independently or as a member of a small team to conduct rigorous, fact-based research and analysis
- Develop independent views and be willing to share and challenge the views of others in an open, collaborative environment built on mutual respect
- Build financial models and conduct quantitative/qualitative analysis to improve the efficiency with which we track and analyze capital markets
- Take thorough notes and document all stages of the due diligence process
- Help prepare the Director of Research and Chief Investment Officer for Investment Committee meetings
- Assist with investment consulting projects and prepare quarterly consulting analysis reports
- Work closely with service providers to ensure the correct data is available in a timely manner
- Develop one-off and regular research reports for internal research focus groups

Qualifications & Requirements

- Ability to collaborate in a professional team environment
- Willingness to voice and defend conclusions using evidence and reason
- Excellent written and verbal communication skills
- Organizational skills to produce high quality work within tight deadlines
- Entrepreneurial spirit, proactive and self-sufficient, yet willing to ask questions and take instruction
- Broad curiosity and a passion for investing
- Graduation from accredited four year college or university with a degree in finance, accounting, economics or a related field
- Minimum 3.5 GPA
- CFA professional, or working toward CFA, strongly preferred
- Strong Excel, Power Point, and Word skills

If you believe that you would be a good fit for our team and would like to be considered for this position, please send a cover letter and resume to Lorrie Allegra at lallegra@btwealthllc.com.