



## Senior Investment Analyst

Fragasso Financial Advisors is a prominent Pittsburgh-based financial investment planning firm. We are passionate about creating an exceptional client experience, and we have been helping clients work towards their financial dreams for 40 years.

**We are currently seeking an experienced Senior Investment Analyst for our downtown office in Pittsburgh, PA. Key responsibilities for this position include:**

- Maintain coverage of existing securities in the firm's current large cap stock model and any potential new strategies. Responsibilities include financial securities analysis, financial modeling, as well as assessment of industry and macroeconomic trends.
- Utilize the firm's proprietary quantitative tools to narrow the list of investment candidates and provide thoroughly researched and supportable investment conclusions on select equities.
- Aid Chief Investment Officer in determining desired sector allocations, targeted exposures, and assess impact of proposed changes.
- Assist Chief Investment Officer in coverage of select asset classes and undertake macro-research to help determine appropriate asset class weighting in client portfolios.
- Perform fund due diligence on select asset classes to determine suitable funds for client portfolios with regard to overall portfolio strategy.
- Construct timely pieces on market events and portfolio construction to disseminate both internally and externally as requested by financial advisors and by the PM department.
- Assist financial advisors with portfolio communications by participating in client meetings to help win new business and service existing clients.

**We are seeking a detail-oriented, self-motivated individual who is passionate about research and analysis. This role is also focused on delivering results and providing excellent customer service to internal and external customers. To be considered for this position, you should possess the following qualifications:**

- Bachelor's degree, preferably in finance and/or economics. MBA is desirable
- Minimum 5 years financial analyst/portfolio management experience.
- Chartered Financial Analyst (CFA®) designation preferred.
- Series 7 and Series 66 certifications (or capacity to obtain upon employment).

**Qualified candidates may send their cover letter and resume to [gpond@fragassoadvisors.com](mailto:gpond@fragassoadvisors.com)**