

Equity Research Analyst

Clifford Swan Investment Counselors
Pasadena, California

Firm Overview

Clifford Swan Investment Counselors is an independent, 100% employee-owned registered investment adviser serving high net worth individuals, families, and not-for-profit organizations. With over \$3.7 billion in assets under management and approximately 750 high net worth and institutional clients, Clifford Swan is committed to providing objective investment management and financial advice with personalized, responsive client service. We specialize in fundamental equity and fixed income investing. Our research efforts are largely focused on large and mid-cap companies with reasonable growth and valuation characteristics. Our longstanding success as a firm is rooted in our values, which prioritize putting our clients first and adhering to the highest ethical standards.

Position Overview

The Equity Analyst is part of a collaborative team of experienced investment professionals and client service specialists who deliver wealth management services to Clifford Swan clients. The analyst works closely with our Director of Equity Research, other analysts and portfolio managers on all phases of the investment process including research and analysis, financial modeling, implementation, and monitoring. Primary duties include conducting fundamental research on existing and new investment ideas, creating and maintaining valuation models, and writing internal research reports. In addition, will work directly with senior portfolio managers on a variety of tasks including portfolio construction and oversight and provide quality client service.

Qualifications

- Demonstrated interest in investments and capital markets, fulfilled by some, or all, of the following:
 - Bachelor's degree in a related subject area with a record of high academic achievement
 - Knowledge/experience in investment management (e.g., RIA, bank, or trust company)
 - CFA or MBA preferred
 - 3-5 years of related work experience in the financial service industry preferred
- Strong quantitative, analytical, and communication skills
- Proficiency in financial databases such as Bloomberg, Eikon and/or cash flow modeling tools such as Applied Finance Group (AFG)
- Demonstrated ability to work both independently and collaboratively as part of a team
- Ability to assign priorities to multiple concurrent, competing requests while ensuring accuracy, completeness, and timeliness
- Candidates must be eligible to work in the United States without sponsorship or restrictions

All applications must include a resume and cover letter. Please send this information to Gretchen Lee via email at GLee@cliffordswan.com.