



Title: Equity Analyst

Status: Full Time Date: June 2019

Hart Capital Management, Inc. is a privately-owned, independent, fee-only wealth and asset management firm headquartered in Spokane, Washington, established in 1998. Our team of talented and knowledgeable investment professionals brings decades of industry experience, as well as a passion for managing capital in the constantly changing financial marketplace. The combination of expertise, flexibility and independence is what makes Hart Capital a true 21st century investment firm.

Equity Analyst Job Summary

Performs research and analysis and/or manages investment options. Provides information and makes recommendations to professional staff and Investment Committee.

Duties and Responsibilities

- Generate new ideas and provide recommendations for stocks, mutual funds, and ETF investments for the equity portfolio
- Run proprietary screens to identify and select potential new investment opportunities
- Conduct research and due diligence including industry level and company specific qualitative research
- Collect and interpret data to build financial models to facilitate investment recommendations
- Write research reports and provide valuation scenarios for investment ideas
- Present and communicate investment ideas to the firm's investment committee
- Remain current on market news as it pertains to current portfolio positions and potential investment ideas.
- Contribute in discussions regarding asset allocation and risk management
- Communicate with clients and relationships managers regarding portfolio positions and investment allocations
- Other duties as assigned

Required Qualifications

- B.S. or B.A. in finance, accounting, economics, or business-related field
- Academic background and working knowledge of financial reporting standards and accounting
- 2+ years of industry experience in equity research, investment management, or capital markets
- CFA Charterholder or current CFA program candidate
- Passion for and working knowledge of equity markets
- Experience building financial models using Microsoft Excel
- Strong proficiency in MS Office, Excel, Word, and PowerPoint
- Ability to communicate effectively and express complex ideas succinctly
- Ability to meet regular deadlines and work with minimal supervision

Candidate must be detail-oriented with the ability to manage projects from inception through execution, have excellent communication skills, both verbal and written, a hunger to learn and ability to flourish in a dynamic, high-growth, entrepreneurial environment. Must be a self-starter with a hands-on approach. Must possess an endless desire to achieve success for a firm that is only scratching the surface of its potential growth.

Salary and Benefits

Pay/benefits are competitive based on industry standards.

- Salary will be based on experience
- Quarterly bonus potential
- Benefits include health care, 401(k), profit sharing, and parking
- Partial and/or full financial support for professional accreditation/continuing education requirement and other education training opportunities [If applicable]
- Supportive TEAM atmosphere
- Career growth potential