

Clients first.



Job Title: Research Associate

Who We Are:

AndCo Consulting is an independent, SEC registered institutional investment consulting firm. We serve as a fiduciary to each of our clients, without exception or caveat, while assisting and guiding them in making important investment and plan design decisions.

Job Summary:

The Research Associate is responsible for the creation and delivery of investment manager search reports, asset allocation studies, and investment and market-related analysis. The role requires a broad understanding of investment asset classes, vehicle types, and performance calculations.

Responsibilities:

- Works as part of the Research Department supporting client requests for investment manager searches, asset allocation studies and other deliverables
- Communicates with team members and consultants to facilitate the selection of appropriate investment managers
- Communicates with investment managers and recordkeepers to confirm investment availability, minimums, fees, account structures
- Collects, files, and maintains investment manager communications, information, and contact details within multiple databases in order to follow and track investment firms and strategies for qualitative and quantitative compliance
- Executes special projects as requested

Required Skills:

- Maintains a high level of professionalism
- Collaborates effectively with all levels of the organization
- Works with a high degree of accuracy and detail orientation
- Excellent written and verbal communication skills
- Displays the ability to be highly organized and flexible with multiple priorities and changing deadlines

Qualifications:

- Bachelor's degree in a related field from an accredited college or university
- Comfort using various third-party software and databases including Morningstar Direct
- Certification, Designation, or Membership in industry specific organization

Benefits of joining AndCo:

AndCo Employees enjoy opportunities to learn and grow alongside committed leaders and colleagues. In addition to a competitive salary, we offer the following benefits: Medical, Vision, Dental, Disability, Life insurance, 401(k) employer match, and 13 paid company holidays in addition to a generous PTO package.

Equal Opportunity Employer:

AndCo is an Equal Opportunity Employer. We invite all qualified applicants to apply and do not discriminate against individuals because of their race, color, religion, national origin, gender, physical or mental disability, veteran status or age.

Working Conditions:

This job is located in Winter Park, Florida. Standard office hours are 8:00AM-5:00PM. This is an exempt position.