



# SCHECHTERWEALTH

## Join The Team

SCHECHTER WEALTH 2015 Winner of "101 Best and Brightest Companies"

Join our team of multi-disciplined professionals who help clients preserve, leverage and transfer their wealth. Recently named one of the top 101 Best & Brightest companies to work for in Metro Detroit and the Nation...our core values create an incredible working environment that allows us to really live and deliver on those values.

### OUR CORE VALUES

Clients Needs First! • Create a complete "WOW" experience for clients and our staff!  
A Special Place To Be! • Cutting Edge Knowledge – we strive to be the experts.

### INVESTMENT ANALYST

#### DESCRIPTION

The Investment Analyst ("IA") applies their analytical skills, insurance and annuity product knowledge, financial planning acumen, and an understanding of our philosophy and methodology to the creation of client-ready proposals, financial planning analyses, and recommendations.

#### ESSENTIAL JOB FUNCTIONS

- Utilize financial and investment analysis to determine the most effective financial planning solutions for clients based on their objectives
- Develop written and graphical materials, including client-ready proposals and presentations
- Collaborate and build effective relationships with the Principals, Analysts, Advisors, and Vendors
- Continuously improve our external and internal deliverables, analysis methodologies, and operational processes

#### EXPERIENCE

- 1-2 years of experience in an investment analysis or finance-related role
- High personal interest in investment analysis or financial planning with historical evidence and examples of your personal dedication in these areas
- Bachelors Degree

#### REQUIRED SKILLS

- Superior analytical, interpersonal, and project management skills, including the ability to manage multiple projects simultaneously
- Ability to present and interact with teammates, vendors, and clients
- Exceptional verbal and written communication skills
- Experience with MS Office—Word, Excel and Outlook
- Ability to manage time and prioritize tasks, including multiple priorities and demands
- Exceptional attention to detail, and a commitment to excellence, thought leadership, and rigor in every aspect of your professional life
- Intermediate-to-advanced Excel modeling skills and a strong academic and practical understanding of financial planning and analysis

Please send your resume to [careers@schechterwealth.com](mailto:careers@schechterwealth.com)

