



## RESEARCH ANALYST

### **Company Overview:**

Benefit Funding Services Group (BFSG) is a retirement plan consulting firm founded in 1990 catering to the mid to large defined contribution plan marketplace. The firm is currently seeking a Research Analyst to support senior retirement plan consultants with investment consulting and reporting.

### **Position Description:**

Provide support in investment analysis through the preparation of investment performance reports and conduct research on mutual funds and separate account managers .

### **Primary Responsibilities:**

- Gather necessary data to prepare complete quarterly investment reviews
- Perform investment analysis/screening criteria to develop fund searches
- Prepare investment section/scoring methodology for investment reviews
- Provide investment research and assist in developing methods to increase overall efficiency in the investment reporting process
- Meet with portfolio analysts (in person or conference calls) to get up to information on manager strategy and portfolio construction
- Manage respective databases (monthly updates, product updates, etc)
- Prepare fund summaries based upon research findings
- Assist in the preparation of market commentaries and white papers as needed

### **Required Skills:**

- Advanced knowledge of Excel (Vlookup, pivot tables, macros, etc)
- Database knowledge preferred (Morningstar Direct)
- Internet browsing/search engines
- Strong written and verbal communication skills
- Knowledge of mutual funds and capital markets is preferred

### **Compensation:**

Competitive compensation package includes base salary, medical benefits, 401(k) plan and potential bonuses.

**To apply for this job, please email your resume to [dstewart@bfsg.net](mailto:dstewart@bfsg.net)**