

Client Leadership - Our Vision

An independent investment consulting firm, Marquette Associates guides institutional investment programs with a focused client service approach and careful research grounded in real-world experience. We've served clients with a single mission for over 30 years – enable institutions to become more effective investment stewards. We are recruiting for a Performance Analyst to collect data and analyze investment performance results for use in developing reports for clients, consultants and internal management.

Job responsibilities will include, but are not limited to:

- Review portfolio holdings and investor statistics to reconcile returns
- Verify accuracy of portfolio investments, benchmark performance results, and monitor performance trends
- Analyze strategies and return metrics and collect data for equities, fixed income, real estate, hedge funds and private equity
- Construct detailed reports and graphs that contribute to the investment performance for individual accounts and overall portfolio composite using Investment Metrics (formerly Investorforce), Morningstar, Bloomberg and proprietary software to report results to clients
- Responsible for daily monitoring of performance exceptions and responding to client requests for issue resolution
- Communicate and/or explain performance results to consulting team when requested

Qualifications:

- Bachelor's degree in Finance, Economics or Business or related field
- Attention to detail and highly organized, ability to work independently to meet deadlines
- Ability to multitask in a fast-paced environment and react to change positively
- Solid knowledge of Microsoft Office (i.e., Word, Excel, PowerPoint); ability to quickly learn new software applications, including those which are proprietary
- CRM or database management a plus
- Critical thinking skills, self-starter with excellent follow-up abilities
- Highly motivated with strong work ethic
- Excellent interpersonal, collaboration and communication skills and ability to work directly with assigned clients and internal Client Analysts

Marquette Associates offers competitive benefits, including medical, dental and vision coverage; flexible spending plans for health care and dependent care; generous time off benefits; 401(k) plan with company match and more.

To apply, please forward your resume to hr@marquetteassociates.com with the subject line "Performance Analyst, WC – Your Name".

We are an Equal Opportunity Employer.