

## **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 Client Analyst to support the consultant team, complete quarterly and monthly investment reporting, participate in client meetings and provide day-to-day client support.

## **Job responsibilities will include, but are not limited to:**

- Work closely with lead consultants in a team-based environment
- Provide day-to-day client support as directed
- Complete client related reporting materials on a quarterly and/or monthly basis
- Create/participate in creating new project parameters based on client requirements
- Act as project manager on designated clients
- Participate in client meetings with lead consultants in a support role
- Mentor junior staff on specific areas of expertise
- Take an active and constructive role within the firm

## **Qualifications:**

- Bachelor's degree in Finance or related field and at least three years of relevant experience
- Knowledge of investment industry (e.g., general financial markets knowledge, asset allocation, performance analysis, portfolio construction, investment policy, asset transfers and rebalancing)
- Advanced Excel skillset
- Interest in or progress towards CFA or other professional designation
- Experience with Investment Metrics (formerly InvestorForce) is a plus
- Professional communication and interpersonal skills
- Ability to multitask in a fast-paced environment and react to change positively
- Attention to detail and highly organized
- Experience with financial reporting and/or legal, compliance functions
- Critical thinking skills, self-starter
- Excellent follow-up abilities
- Strong attention to detail with ability to work independently to meet deadlines

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](mailto:hr@marquetteassociates.com) with the subject line "Client Analyst – *Your Name*".

**We are an Equal Opportunity Employer.**