JOHNSON BIXBY

Equity Trader & Operations

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Come and make ripples of positive impact with us.
At our companies, we believe our positive actions in one area connect to other areas, and make a difference for each other, our clients, our professions, and our community. Together, we make a ripple effect of positive impact.

We forge and feed relationships that are mutually beneficial and satisfying, through knowledge, care and support. We call it our culture of symbiosis. And our shared values guide us in our everyday work together — Build Connection, Practice Curiosity, Bring Energy, Stay Humble, and Think Big.

About the Position
We are seeking a full-time, onsite Equity Trader & Operations professional to join our team. In this role, you will support the firm's investment operations and portfolio management functions through trade execution, investment research, portfolio analysis, performance reporting, and account administration activities. You will assist with portfolio implementation and rebalancing, monitor investment performance, prepare investment and client reports, and maintain accurate investment and account records.

You will support client account operations, including cashiering activities, account maintenance, and report preparation, while helping ensure efficient and accurate workflows across the organization. You will also contribute to process improvement initiatives, support investment committee and client meeting preparation, and help deliver a high-quality client experience.

This role is ideal for a detail-oriented, analytical professional who thrives in a collaborative environment and is passionate about investment management, operational excellence, and delivering exceptional service to clients.

What You'll Bring to Us:
- Bachelor's degree in Finance, Economics, or a related field.
- Minimum of 2 years of financial services experience, including trading responsibilities and demonstrated proficiency with model portfolios and trading in Eclipse.
- At least 2 years of trading experience, with a minimum of 6 months performed independently without supervision.
- Successful completion of the SIE, Series 7, and Series 66 examinations (or within 6 months of hire date).
- Proficiency with investment research tools (Eclipse Morningstar, YCharts) and portfolio management systems.
- Advanced skills in Excel or similar analytical tools to manipulate data, build models, and automate analysis.
- Foundational understanding of financial markets, investment instruments, and portfolio construction principles.
- Ability to conduct investment analysis and prepare supporting materials with limited supervision.
- Commitment to developing knowledge of risk management practices, compliance standards, and fiduciary responsibilities.

- Ongoing engagement with a broad range of asset classes and their roles within diversified portfolios.
- Demonstrated initiative in pursuing independent research projects and contributing meaningful insights to the investment team.
- Ability to maintain strict confidentiality regarding client data and company information.
- Ability to evaluate and interpret data to identify trends, inform decisions, and generate meaningful insights.
- Effectively balance deadlines and responsibilities, staying responsive and delivering reliable results.
- Proactively identify and implement process improvements; taking initiative to refine systems and workflows.
- Exceptional communication skills, with a strong emphasis on both oral and written interactions when engaging with clients and team members.

About Johnson Bixby
Johnson Bixby is a leading financial planning firm in downtown Vancouver, Washington. We are passionate about empowering and mentoring the next generation of financial services professionals. We're looking for humble, growth-minded talent who understand the value of long-term financial planning and are ready to walk alongside our clients to help them make informed decisions, build long-term financial confidence, and navigate life's challenges and opportunities as they come.

Our Employee Value Proposition
At Johnson Bixby, we are committed to creating an environment where everyone has the opportunity to thrive. Here's how we make that happen.

Purpose: At Johnson Bixby, your work has purpose. You help clients achieve peace of mind and shape a stronger financial future – for them and for yourself.

Total Rewards: We value your contribution and invest in your success with rewards that support your financial, physical, and personal well-being.

Team Culture: We've built a culture grounded in trust, leadership, and teamwork — where people feel connected, respected, and empowered to do their best work.

Learning & Development: We invest in your growth because your success drives ours. With ongoing learning, mentorship, and development, you can build a career you're proud of.

Our benefits package includes:
- 14 days of PTO in first year, plus 10 paid holidays (including floating holidays)
- Medical, Dental, & Vision 100% paid for eligible team members (team members pay for qualifying dependents)
- Life/AD&D Insurance
- 401(k) Retirement Plan with company match
- Other Compensation - Team members may receive performance bonuses and profit share

If you're ready to be part of a dedicated team that values growth and client excellence, apply today!

Johnson Bixby is proud to be an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, age, national origin, disability, veteran status, military service, or any other characteristic protected by law.

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