

Investment Analyst

The Role

This is a full-time position, including benefits, based in Vancouver, WA. As our business grows, we are adding to our team and looking for an Investment Analyst. Reporting to our Director of Portfolio Services, this role focuses on the development, implementation, and management of multi-asset class portfolios. If you are an eager team-player who enjoys working in an energetic environment, this may be a great opportunity for you! Come join us at our newly expanded Columbia River waterfront office!

Day to Day Responsibilities

- Efficiently and accurately trade & rebalance client accounts.
- Ensure asset allocation and tactical allocations are accurately implemented and periodically reviewed.
- Own updating fund performance and index sheets, including assisting in research and due diligence of investment products and managers.
- Generate portfolio reviews with proposed recommendations.
- Track and monitor high dollar transactions and cash flows.
- Organized and detailed as required to handle multiple client relationships with contending priorities and coordinate team member resources most effectively.
- Hours: 7:30am to 4:30pm Monday to Friday in person, with early office closure at 3pm every Friday.

Qualifications

- Bachelor's degree from an accredited college or university with an emphasis in finance, economics, accounting, mathematics, or similarly quantitative field.
- 3-6 years prior work experience preferred, but entry level candidates will also be considered if they have a strong academic record.
- Detail oriented, focused, and able to balance multiple requests while maintaining excellent customer service.
- Good knowledge of computers and relevant software applications (Word, Excel, Outlook, Adobe).
- Strong written/verbal communication, attention to detail, and desire to work in a team environment.
- High degree of confidentiality and trust.

Salary And Benefits

- Our employees enjoy a competitive compensation and benefits package, including 100% paid employee medical (includes vision) premiums, 401(K) plan with employer contribution after a year, PTO that increases with tenure in addition to sick time, additional paid holidays off, and early office closure every Friday.
- We recently completed an expansion of our office and are excited to share our beautiful new space with clients and our team in 2024. Our centrally located, Columbia River waterfront office provides for an exciting place to work, and we enjoy regular team outings around the Portland-SW Washington area.
- This position is in-office 5 days a week and is not remote.
- If you are someone who's a team player and has a love of the Pacific Northwest, come join us!

Martel Wealth Advisors, Inc. is an independent, boutique investment management firm based in the Pacific Northwest since 1982. Today, we advise high net worth families and employer-sponsored retirement plans across 10+ states with over \$1 billion in assets under management. The firm, supported by a dedicated team of specialists, offers our clients a bespoke array of investment and retirement planning opportunities. Our headquarters is located on the waterfront of the Columbia River in Vancouver, WA.