

Senior Investment Analyst

Reward

£30,000 - £38,000 depending on experience

Location

Cardiff

Role

Work for us and you will become part of a close-knit team that is skilled, experienced and passionate about delivering a high-quality service to external clients and internal customers.

You will be instrumental in the ongoing development of the investment team to attain profitable and sustainable growth through effective client management. You will offer support to the Investment Consultants and assist with the ongoing development of the team.

The role involves delivering day-to-day investment services to clients, managing fees, sourcing investment information to prepare reports, arranging client meetings, liaising with fund managers, transaction activities and some modelling work. The role is varied, and you will be working across many clients, giving you exposure to a wide range of investment work.

The successful candidate will have good project management and Excel skills and be able to manage their own workflow, re-prioritising tasks as necessary. Good communication skills and attention to detail are essential, and you will need to be able to work to tight deadlines and take a pro-active approach to your work.

You will have experience working in the pensions, actuarial or investment sector and ideally have some relevant pensions or investment qualifications considered suitable for this role. Experience of overseeing transitions would be advantageous, but not essential. Full training will be provided.

There is room to grow in this role, with the successful candidate having the potential to lead a team, managing the workflow and mentoring any direct reports. There will be the opportunity for you to study towards relevant professional qualifications to support your own progress and development.

A full job description is available on request.

What next?

If you are interested in this role please send your CV and covering letter, clearly outlining your relevant qualifications, skills and experience to recruitment@quantumadvisory.co.uk

Quantum Advisory is an equal opportunities employer.