CPS Investment Advisors
Steady as You Grow

Portfolio Analyst

As a Portfolio Analyst for CPS Investment Advisors you will be part of a team managing over a billion dollars of client assets. You will spend your time conducting top-down and bottom-up research on the financial markets and companies, investing client assets in accordance with firm philosophy and the client Investment Policy Statement, and being an active resource for advisors within CPS and its member CPAlliance firms.

Portfolio Analysts within CPS are given high levels of responsibility. Advisors and clients rely on the Portfolio Analysts to ensure the portfolios are invested correctly, continuously monitored, and to provide insight or clarity on investment decisions when required. CPS supports Portfolio Analysts by offering extensive training opportunities to continue their education, further their careers, and serve their clients financial lives.

The ideal candidate for this position has a passion for financial markets and a curiosity about investments. The candidate would be able to think critically and be comfortable making decisions independently in ambiguous situations. Finally, the candidate would be driven to continually learn and educate themselves as the industry evolves.

Duties & Responsibilities

- Maintain client portfolios including:
    - Invest cash inflows
    - Generate cash for outflows
    - Rebalance portfolios according to the investment philosophy and IPS
    - Monitor portfolio cash and investment drift
- Participate in research and analysis of investment opportunities including:
    - Stocks, ETFs, Mutual Funds, and Fixed Income Instruments
    - Prospective portfolio analysis
- Be a resource for internal CPS advisors and external CPAlliance advisors
- Support the money management department with other activities as needed.

Education and Skill Requirements

- Bachelor’s Degree in Accounting, Finance, Economics, or Business Administration. Other degrees will be considered on a case-by-case basis.
- Series 65 license (ability to obtain one)
- Willingness and desire to obtain CPA, CFA, or CFP designations/licenses
- Fluent in MS Word and MS Excel (able to construct pivot tables and regression analysis)

Interested applicants can send their résumé and contact information to Matthew Treskovich at matt@cpsinvest.com.

CPS Investment Advisors is a full-service, independent financial advisory firm located in Lakeland, Florida. CPS provides holistic financial planning and investment advice to its clients for them to achieve the ultimate financial freedom: the ability to choose between wanting to work and being required to work.