

Portfolio Analyst

As a Portfolio Analyst for CPS Investment Advisors you will be part of a team managing over 2 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.

The ideal candidate for this position has a passion for financial markets and investments. Candidates should have critical thinking skills, be comfortable presenting investment ideas, and making decisions independently. Portfolio Analysts within CPS are recognized for their high levels of autonomy to become the subject matter experts of our investment philosophy. Advisors and clients rely on the Portfolio Analysts to ensure the portfolios are invested accurately, consistently monitored, and to routinely provide insight or clarity on investment decisions. CPS supports Portfolio Analysts by offering extensive training opportunities to continue their education, further their career, and serve their clients financial lives. 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 & 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 CFA, CFP, or CIMA designations/licenses
- Fluent in MS Word and MS Excel (able to construct pivot tables and regression analysis)
- Experience in SS&C, Orion, MorningStar, YCharts, or other equivalent portfolio management software

What's next? Send your resume to Susan Starr at Susan@cpsinvest.com and take our 7-minute survey below.
<https://go.cultureindex.com/s/Oq2VWnBAgv>

Salary & Benefits

- Competitive salary commensurate with experience
- Benefit highlights include health, dental, vision, and long-term disability insurance, escalating paid vacation, paid sick time, paid holidays, employer-paid life insurance, 50% 401K match, employer-paid CPE, and team goal bonus

About Us

CPS Investment Advisors is a full-service, independent financial advisory firm located in Lakeland, Florida. We have been consistently awarded the “Best Places to Work.” 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.