



Job Title: Investment Analyst	Job Level: Associate
Location: Milwaukee or Rhinelander	Type of Position: Full Time
Exempt / Non-Exempt: Exempt	Anticipated Start Date: 2021 / 2022

Background of Heck Capital Advisors

Heck Capital Advisors, LLC is an independent investment advisory firm with a strong foundation. We have been serving individual and institutional clients with comprehensive investment services from the heart of Wisconsin, where Robert Heck first began the family's investment legacy in the 1950's. Heck Capital's managers and advisors offer small-town values and an exceptional work ethic with competitive investment services for our clients.

Heck Capital Advisors is uniquely positioned to develop an exceptional relationship with our clients while providing competitive employment opportunities with our employees. While earning national respect for our firm, we have remained grounded in our Wisconsin values and excellent work ethic. Client referrals are a testament to our work and have allowed us to cultivate a national reach – investing and consulting to over \$6 billion in assets with client relationships in 30+ states.

www.heckcapital.com

Essential Job Functions

The Investment Analyst position is an integral component of the Analytics team. The team provides detailed reporting, due diligence and in-depth analytics to the advisors and consultants at Heck Capital who serve high net worth individuals, corporations, foundations, endowments, defined contribution and defined benefit plans. The analyst will work closely with the professionals on the team with a focus on supporting other analysts and assisting with client reporting, manager due diligence and manager searches, etc. We are seeking a candidate that is highly motivated, works independently, is proactive, and has a willingness to grow and take on new tasks and assignments.

- Assists in Firm Trading
 - Individual sell downs & buy ups – daily / monthly / quarterly
 - Discretionary Styles
- Prepare daily reports for both Consulting and Individual relationships.
- Assists in the preparation of Consulting and Individual client reports on a daily basis.
- Produces analysis for monthly and quarterly reporting and supports the creation of monthly and quarterly consulting reports in a timely and accurate fashion.
 - Fact Sheets

NOTE: This job description is not intended to be all-inclusive. Employee may perform other related duties as directed to meet the ongoing needs of the organization.
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- Monthly performance reports
- Monthly Investment Manager Comparison reports
- HCA Due Diligence
- Quarterly Manager Analysis
- Prepares documentation for audited performance examinations on a quarterly basis.
- Responsible for a variety of data processing including preparation of fee breakdown/pivot-tables.
- Prepares and proofs Excel spreadsheets, including client spreadsheets and responds to requests for analysis.
- Provides analysis for research, investment manager searches & screens, and market updates.
- Must be able to independently “troubleshoot” issues related to the projects given to ensure that project delays are limited.
- Update in-house data/security maintenance on a weekly basis.
- Assists in the on-going growth and development of the firm as may be needed.
- Other duties as assigned.

Requirements

- Bachelor’s degree in finance, economics business administration or related area required
- Series 65 examination is required to be taken within approximately 120 days from employee start day (completion of examination is required for position)
- Advanced designation(s) or ability to work toward advanced designation(s) required
- Knowledge/familiarity with markets and investments
- Ensures confidentiality with respect to all information pertaining to clients and potential clients
- Excellent oral, written and interpersonal communication skills
- Excellent attention to detail and accuracy
- Computer skills: Microsoft Office (especially Excel), and the ability to learn and adapt to changes in technology

How to Apply:

Send Resume’ and Cover Letter to:

Heck Capital Advisors

Attn: Nils Dillon

Email: ndillon@heckcapital.com (Attn: Investment Analyst Associate)

Benefits:

Insurance: Health Insurance, Dental Insurance, Vision Insurance

Leave & Holiday: Sick Leave, Paid Holidays, Paid Vacation

Retirement & Financial: 401(k) Plan, Profit Sharing Plan, HSA Plan

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