



## **Job Title: Research Analyst/Senior Analyst**

### **About Westmount**

Since we established Westmount in 1990, our vision has been clear. Be an incubator for innovative thinking, whether that's being one of the earliest firms to adopt a business model that puts clients' interests first, embracing alternative investments like real estate and private debt, or providing leading-edge financial planning. There's something else: our people. Westmount strives to be a magnet for the top talent in wealth management by providing thoughtful mentoring, a supportive environment for growth and the freedom to pursue fresh new ideas on behalf of our clients. That mindset has allowed us to assemble one of the sharpest, most dynamic advisory teams in LA.

### **Responsibilities**

- Perform qualitative and quantitative due diligence on investment funds and conduct investment strategy specific research across traditional asset classes, as well as alternative investments and limited partnerships.
- Source new ideas, meet with portfolio managers and other investment professionals, document meetings, provide written research opinions and evaluations.
- Produce all collateral and deliverables associated with assigned investment managers, including, but not limited to, manager meeting summaries, evaluations, and ad hoc analysis.
- Contribute to educational materials, memos and quarterly communications related to specific markets, investment strategies, and industry trends.
- Provide support to Senior Advisors by performing research on the markets, asset classes, and/or funds as needed.
- Represent the firm to the external investment community in a professional manner during conference calls, in-person meetings, off-site events, and manager on-site visits.

### **Requirements**

- Experience with private investments (limited partnerships) is required
- Bachelor's degree, ideally in Finance, Business Administration, Economics, or related business fields
- 2-4 years of investment manager research, institutional or HNW consulting experience
- CFA charter and/or CAIA designation preferred

- Strong organizational, communication and analytical skills and the ability to effectively summarize findings, both verbally and in writing, in a clear and concise manner
- Intellectual curiosity and keen attention to detail and accuracy
- Team player with a passion for manager research
- High proficiency with Microsoft Office and data management
- Familiarity with Bloomberg, Morningstar, Zephyr a plus

Interested candidates should send their resume to [careers@westmount.com](mailto:careers@westmount.com).