**Financial Analyst**

**Company and Position Overview**

Investments company that handles several high-net-worth families’ portfolios is seeking an analyst to join its team to assist in portfolio maintenance.

**Primary Functions**

* Tracking daily performance of securities in portfolios and market trends.
* Updating portfolios for transactions, cashflows and other developments.
* Preparing consolidated reports and performance calculators in preparation for client meetings.
* Reviewing and summarizing company and sector research reports.
* Reconciling portfolios against bank statements.
* Reviewing bank charges.
* Preparing annual tax calculations and reviewing against bank tax reporting.

**Skills & Qualifications**

* Strong interest and an understanding of financial markets.
* B.S in Finance or Accounting / prior experience in finance or accounting work preferred.
* Organized, reliable, able to work independently, precise, comfortable with numbers.
* Discreet.
* Familiarity with Excel.
* Ability to work in English.