



MINARD CAPITAL

## Position Description

### **Title: Senior Research Analyst**

Location: San Francisco, CA (Remote considered but must be available during PST business hours.)

### **Who we're looking for:**

- Very fast typist who can translate phone conversations into detailed, formatted notes;
- Detail oriented researcher who can construct detailed profiles for our clients;
- Complete command of MS Office especially Word and Excel;
- Incredible attention to detail and self-motivated with an unquestioned work ethic, commitment to honesty, and the ability to thrive in a fast-paced environment;
- Critical thinker with the confidence to produce original thought and convey clear message;
- Someone who is articulate, punctual, kind and thoughtful;
- Exceptional written and verbal communication skills with knowledge of proper grammar, sentence syntax and etiquette, and a commitment to contribute to a safe, honest, transparent environment where opinions and ideas are freely shared;
- Tech-savvy with a genuine interest in utilizing technology to increase efficiency, team communication and transparency;
- Self-imposed standard of excellence with high EQ;
- Command of Apple products, Salesforce, MS Office and Internet Research to build investor profiles;

### **What you'll do:**

- In partnership with, and at the direction of the Director of Research and the CEO, you will assist or directly manage projects related to the following:
  - Update Salesforce CRM database and related applications to ensure accuracy of relevant client information;
  - Ensure that data entered into the firm's CRM is accurate and routinely updated;
  - Research natural buyers for client's strategies using Google, Prequin and proprietary and external databases;
  - Construct and build Excel-based Progress Report Templates for new clients;
  - Construct Revenue Generation Pipelines in Excel for clients by researching key allocators actively investing in clients' strategies;
  - Assist in the construction of meeting collateral including the construction of investor profiles and meeting agendas;
  - Construct Research Reports that cull key information into a color-coded, easy-to-intepret report that guides marketing strategy and sales;

### **What you'll get:**

- An elite and passionate team of colleagues working to change the face of the asset management industry;
- All of the necessary resources you need to grow and develop in your career;
- Gold-tier PPO health benefits including 75% employer paid medical and 100% paid dental & vision premiums for employees;
- 50% premium reimbursement (up to \$100 per month) to a sports club or gym of your choice;
- Fully stocked pantry and fridge customized to team preferences. Regular paid lunches and team events;
- Exquisite office in the heart of San Francisco with top-line Apple technology, sit / stand desks and fully customized accessories;
- Competitive salary, EOE and PTO allowances with twelve (12) holidays observed annually.
- We offer off-cycle bonuses to our staff who prove exemplary in their work ethic, loyalty and commitment. We work hard to ensure all our team members are happy, recognized and rewarded for their contributions.

### **Qualifications:**

- Bachelor's Degree in Finance, Business, Journalism, Marketing, English or a related field;
- Prior experience working with Salesforce or a comparable CRM tool;
- Comfortable working both collaboratively and independently with an entrepreneurial attitude and focus;



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- Skilled use of Apple technology for business functions a must; Fluent touch-typing ability required.
- Command of Excel, Word and ideally InDesign and Powerpoint.
- A love of learning, of people and of rewarding work.

**To apply:**

Kindly e-mail cover letter, CV and a writing sample as a combined PDF to [careers@minardcapital.com](mailto:careers@minardcapital.com). Indicate “Research Analyst – Your Name” in the subject line.