



# HIGHLAND

## **JOB TITLE: ANALYST TRAINING PROGRAM (INVESTMENT CONSULTING)**

### **FIRM BACKGROUND**

Highland Associates is a leading institutional investment firm that provides objective, research-driven investment counsel to not-for-profit healthcare entities and mission-based organizations. Our credentialed advisors' hyper-awareness of financial market dynamics, deep understanding of the industry, and commitment to due diligence inform the forward-looking investment management programs that we customize for each client. We base our success not only on the returns that we generate, but also on building collaborative, supportive, and candid long-term relationships with our partners. Highland is well known and well regarded, not just in our hometown of Birmingham, AL, but across the nation. We currently advise on over \$23 billion in total assets and rank among the top 20 investment consulting firms in the U.S. for outsourced assets under management. We have been recognized by *Pension & Investments* as one of the "Best Places to Work in Money Management." Highland is a highly collaborative company whose values include teamwork, forward-thinking, and integrity. We work hard to deliver value to our clients, and we regularly celebrate our successes with activities outside of the office. We also provide outstanding benefits to our employees, including competitive salary, health benefits, 401k matching, and profit-sharing. For more firm details, visit [www.highlandassoc.com](http://www.highlandassoc.com)

### **JOB DESCRIPTION**

The Associate Analyst position is targeted to current college seniors looking for an entry level position in investments upon graduation. Analysts will gain a comprehensive understanding of financial markets and investment strategies, while also developing the skills necessary to succeed at higher levels in the firm. Analysts will assist in each of the firm's primary business functions, including Research, Consulting, and Performance. Specific roles and responsibilities within Research include 1) regular monitoring of approved investment managers across all asset classes (equity, fixed income, hedge funds, private equity, and other alternatives), 2) assistance with periodic searches for new managers across all asset classes, 3) analysis of data to support ongoing capital markets forecasts, 4) implementation of risk management tools, and 5) contributions to firm publications. Specific roles and responsibilities within Consulting include 1) completion of portfolio reports for clients, 2) financial modeling and scenario analysis on client portfolios, and 3) assistance with other ongoing projects, including asset allocation models. Specific roles and responsibilities within Performance include 1) production of monthly and quarterly performance reports, and 2) maintenance of historical allocation and performance attribution data for firm clients.

Highland offers a truly dynamic work environment that encourages individual accountability and teamwork and purposefully promotes professional development initiatives. To that end, we have developed a comprehensive development plan for this position that emphasizes milestones for skill development in the areas of manager due diligence, capital markets analysis/returns forecasting, and asset allocation/portfolio management. We are also committed to providing financial support for analysts as they pursue the Chartered Financial Analyst designation.

### **DESIRED SKILLS**

Applicants for this position should have a strong academic background and some working knowledge of or experience in the financial/investment industry. Ideal candidates will display a genuine passion for investing. Superior written and verbal communication, time management, analytical, and organizational skills are also required, as is MS Excel proficiency. Coding and modeling skills are also desired, though not required. Applicants should be capable of working both independently and in teams. A willingness to keep an open mind, a strong desire to learn, and an ability to think critically are all essential to achieving success at Highland.

### **CONTACT**

Interested candidates should send their resume and cover letter to Will Wykle at [wwykle@highlandassoc.com](mailto:wwykle@highlandassoc.com). The deadline for application submissions is Monday, September 17. We expect to extend offers by the end of October.