

We are a fee-only wealth management firm. Our mission is to assist clients in achieving their financial goals. We provide comprehensive financial planning and ongoing investment management. Our hallmark is a highly-personalized approach, focused on the unique goals and needs of each client. We offer direct personal service from our exceptionally well qualified and experienced professionals. Our employees are highly engaged, service-oriented, and scrupulously honest.

Position Summary:

The Trader/Investment Analyst will be a member of the investment team and expected to handle all trading functions for the firm including, but not limited to, placing trades electronically, facilitating fixed income trades with brokers, reconciling trades daily, ensuring best trade execution, etc... This position requires a self-starter with strong technology skills as well as sufficient financial knowledge to assist in data gathering and analysis of securities for potential investment. The Trader/Investment Analyst will assist all Investment Managers with research and organization of data used for the management of client portfolios. Foster & Motley uses individual stocks and bonds as well as mutual funds and ETFs for client portfolios. Competitive compensation and benefits are commensurate with experience. Opportunity for advancement is available based on qualifications and job performance.

Essential Functions:

- Enter trade orders, ensure best execution, and reconcile trades.
- Facilitate fixed income trading with bond brokers.
- Establish and update a variety of files and documents.
- Research and analyze investment related data.
- Organize meetings and record meeting minutes for investment team.
- Assist in data gathering for Investment Managers.
- Perform other such duties as assigned.

Knowledge, Skills, and Abilities:

- Knowledge of investment products.
- Strong technology skills
- Aptitude for learning and improving upon processes.
- Excellent communication skills – oral and written.
- Ability to work independently and within a team environment.
- Focus on ethical conduct and maintaining confidentiality.
- Organized, detail oriented, and proficient at multi-tasking.
- Dependable and personable.

Qualifications:

- Bachelor's degree is required, Finance background is preferred.
- Thorough knowledge of Microsoft applications with an emphasis on Excel is essential.
- Work experience within the financial services industry is a plus.
- Experience using Bloomberg Terminal, Tamarac, Salesforce, and/or NetDocuments is a plus.

To apply, email a cover letter and resume to:

Zach Horn
Shareholder/Investment Manager
zach@fosterandmotley.com

Foster & Motley, Inc.
7755 Montgomery Road, Suite 100
Cincinnati, OH 45236
(513)561-6640
Website: www.fosterandmotley.com