

Would you like the opportunity to work within a growing, dynamic, wealth management firm? We are seeking a qualified candidate to join MASECO Private Wealth as an Investment Analyst to support a team consisting of the Chief Investment Officer and an Investment Analyst. You will report to the Chief Investment Officer on a day-to-day basis.

The ideal candidate would be degree educated ideally in quantitative finance. The candidate should be organized with a keen attention to detail and strong numeracy skills and have at least 3 years of experience in fund research or fixed income research as a Junior Investment Analyst. Knowledge of Morningstar is a definite plus.

The ability to interact with staff (at all levels) in a fast-paced environment, sometimes under pressure while remaining calm and flexible, proactive, resourceful and efficient with a high level of professionalism and confidentiality is crucial to this role. Strong written and verbal communication skills, decision-making abilities and attention to detail are equally important.

## About MASECO Private Wealth

MASECO Private Wealth offers a holistic wealth management approach in developing and implementing tax efficient global wealth and asset management strategies for US persons who are non-domiciled in the UK. With more than a decade of experience in providing cross-border US Wealth Management services, MASECO employs leading global investment strategies and solutions that are both tax efficient and compliant.

## Our Values

MASECO Private Wealth was founded in 2008 in the wake of the non-domicile tax rules being introduced in the UK. The Partners had previously developed the US/UK private client desk within a large Private Bank in London. They realised that as a result of these legislative changes, a different approach would be required to service the needs of US citizens living in the UK. The alternative structure needed to remain not only tax-efficient and cost effective for American individuals living in the UK but would also need to be built upon global best practices. Just over 10 years later, MASECO oversees over \$1.5 billion in assets for approximately 600 families.

## What we do

MASECO develops and implements global, tax-efficient wealth strategies for families, trusts and foundations based in the UK, USA and internationally. Our aim is to deliver expert advice, designed to simplify and tackle the complexities associated with cross-border wealth management. We deliver comprehensive wealth management and investment advice to clients based on trust and open communication. Our mission is to guide families with cross-border economic interests to a meaningful financial future. MASECO's Wealth Management equation provides a framework for the delivery of a systematic wealth management offering:

Wealth Management = Investment Management + Wealth Planning + Relationship Management

Authenticity



Teamwork



Pursuit of Excellence



Empathy



Mastery



## Specific duties and responsibilities include:

- Perform fund due diligence, including screening, manager interviews, reviews
- Maintain and improve workflow procedures
- Design of new model portfolios where required, using a variety of currencies and fund domiciles
- Portfolio Management – All Core and Bespoke Portfolios are designed and maintained in accordance with specified guidelines
- Assist CIO in improving and maintaining the firm's framework for strategic asset allocation
- Maintain a high degree of technical knowledge relating to core product areas and surrounding legislation
- Collaborate with marketing team and compliance to maintain and improve client facing materials
- Create efficiencies by automating existing processes
- Responsible for maintaining all required files and records for compliance purposes
- Assist CIO in the maintenance and improvement of the risk and portfolio construction framework
- Design and monitoring of direct equity and fixed income holdings including fixed income replacement upon bond maturity
- Write investment letters and short blogs on relevant investment topics
- Stay up to date on relevant academic and industry publications.

## Skills and specifications for the role:

- Strong numerical and analytical skills with close attention to detail to maintain the highest level of quality
- Strong research skills and the ability to package information clearly and concisely for the team
- Deploy assertiveness skills and use initiative when appropriate to build and maintain good relationships across the company
- Excellent interpersonal skills; able to listen and converse well on all levels as well as exceptional written and verbal communication skills
- Team player with experience of working in a team environment, able to identify and help others when required
- Efficient time management skills to plan workload and prioritise accordingly
- Tactful, trustworthy, diplomatic and able to maintain confidentiality
- A deep-rooted desire to continue to learn, develop and implement processes and procedures
- Personal development focus, taking responsibility for driving forward personal and professional development in order to maximise effectiveness in this busy and demanding role and to grow within the company
- Hold values that are in line with our own and that will help strengthen our culture.

## Education and qualification requirements:

- Degree educated – minimum 2:1, ideally in a subject requiring mathematics or financial knowledge
- Strong knowledge of MS Office Suite; Excel, Word and Power point
- Strong Coding ability in VBA is a definite plus.

The base compensation is per annum and a discretionary bonus plan and competitive benefits plan is offered.

The closing date for applications is open ended. Please submit your CV with a covering letter to [Denise.Smith@masecopw.com](mailto:Denise.Smith@masecopw.com).

Authenticity



Teamwork



Pursuit of Excellence



Empathy



Mastery

