Job Description: Entry-Level Investment Analyst – Endowment Wealth Management Inc.
Position: Entry-Level Investment Analyst
Location: Appleton, Wisconsin
Reports to: Jamie Brown, Senior Investment Officer
Compensation: Salary, bonus, medical, dental, vision, 401k. Salary commensurate with experience.
Job Type: Full-time

About Us

Endowment Wealth Management Inc. is a leading independent wealth advisory firm dedicated to helping individuals, families, and institutions throughout the United States achieve their long-term financial goals. We specialize in multi-generational wealth planning, endowment-style investing, and providing strategic solutions to build lasting financial legacies. We differentiate our services through our 3-D Endowment Investment Philosophy®, under which we construct diversified ETF portfolios, seek out top quartile traditional and private fund managers, and pursue opportunistic and thematic venture capital and private equity investments through our proprietary private funds.

Our team operates with the highest level of professionalism, ethics, and collaboration, fostering an environment where motivated individuals can grow their careers.

Job Summary

We are seeking a motivated **Entry-Level Investment Analyst** to join our rapidly growing 12-year-old SEC-registered investment advisor (RIA) headquartered in Appleton, WI. The investment analyst will join our investment team to assist in monitoring existing traditional and alternative investments along with performing due diligence on new investment opportunities. This role offers an excellent opportunity to pursue your passion for investing by assisting our investments team with investment analysis, portfolio management, ETF model construction, and qualitative and quantitative research of private fund managers, venture capital, and private equity opportunities in a dynamic, client-centered environment.

The successful candidate will play a key role in supporting the chief investment officer and senior investment officer with trading, research, performance tracking, investment strategy, and high-net-worth and institutional client development. The ideal candidate holds an undergraduate or graduate degree in business, majoring in finance, accounting, or economics, with an awareness of capital markets. A chartered financial analyst (CFA) certification or a current candidate of the CFA and/or chartered alternative investment analyst (CAIA) program would be considered an asset. The successful candidate will be a team player with excellent communication skills, advanced excel spreadsheet skills, and possess strong fundamental and analytical skills with accurate attention to detail. Written and spoken competence in English is required.

Key Responsibilities

- Assist with trading within client accounts.
- Assist with financial and market research to support investment decisions.
- Monitor portfolio performance and prepare performance reports.
- Conduct quantitative and qualitative analysis on exchange-traded funds, third party active managers, and private funds, including private equity, venture capital, co-investments, and structured products.
- Prepare presentations and reports for client meetings.
- Stay current on global economic trends, market developments, and industry insights.
- Collaborate with the CIO and senior analysts on strategic initiatives.
- HNW and institutional client development.
- Participate in portfolio reviews, asset allocation discussions, and investment committee meetings.

Qualifications

- Education: Bachelor's degree in finance, accounting, economics, or a related field.
- CFA level 1 candidate or higher.
- Passion for investing and financial markets.
- Strong quantitative and qualitative analytical skills to assess the economic performance / perform analysis of companies and industries.
- Ability to gain and develop investment thesis and insights from accounting and financial information gleaned from public and private investment sources.
- Excellent verbal and written communicate skills.
- Ability to explain technical subject matter in a friendly and simple manner.
- Fiduciary mindset: candidate must be highly ethical and a team player.
- Proficient in Excel, PowerPoint, and financial modeling.
- A high level of integrity and attention to detail.
- Strong technical/conceptual understanding of finance and valuations.
- Ability to work independently and within a collaborative team environment.

Why Join Us?

- Compensation includes base salary, bonus eligibility, health insurance, dental, vision, matching 401k, paid vacation, and HSA program.
- Opportunity to work for a rapidly growing RIA in a challenging and dynamic work environment that values innovation, independence, and growth.
- Mentorship and professional development under the guidance of experienced advisory and asset management team.
- Opportunity to work with sophisticated investment strategies.
- Collaborative, supportive work environment with growth potential.
- Flexible hybrid home-office work environment.
- Northeast Wisconsin is considered a favorable place to live due to its affordable housing and low cost of living, diverse communities, high quality of life, access to outdoor recreation, strong public education system, and a relatively low crime rate, with cities like Appleton and nearby Green Bay often ranking highly in "best places to live" lists, particularly for families seeking a good balance between urban amenities and natural beauty.

How to Apply

Interested candidates should submit their **resume and cover letter** to **"Analyst1@EndowmentWM.com"** with the subject line: "Application – Entry-Level Investment Analyst."

Applications will be reviewed on a rolling basis.

Company Description

Endowment Wealth Management Inc., and its affiliates, ETF Model Solutions, LLC and Global Alternative Investment Management, LLC are financial service firms currently managing $440+ million in AUM and serving clients in eighteen states. We are thought leaders in the investment advisory and investment management business working closely together to serve multi-generational families, advisory firms, and institutional clients locally, regionally, and nationally within the context of our 3-D Endowment Investment Philosophy. We are co-creators of the Endowment Index® calculated by Nasdaq OMX®, symbol ENDOW. To learn more visit www.EndowmentWM.com.

Our affiliated operating entities include:

- Endowment Wealth Management Inc. ("EWM") is an independent private wealth management firm whose corporate mission is to provide wealth sustainability for individuals, families, retirement plans, endowments, foundations, and other institutions. We are valued as high net worth family wealth advisors serving clients in 18 states because of our fee-only fiduciary services, our experienced professional team, and the use of our 3-D Endowment Investment Philosophy.

- ETF Model Solutions, LLC ("ETFMS") develops ETF-based investment models within the framework of the Endowment Investment Philosophy. We seek to provide our investment solutions to 401(k) plans, other investment advisors, family offices, endowments, foundations, trusts, and individual investors. Embark-Invest.com™ is a digital website providing individual investors with access to six specific ETF investment models that utilizes our 3-D Endowment Investment Philosophy. Learn more at www.ETFModelSolutions.com.
- Global Alternative Investment Management LLC ("GAIM"), an alternatives investment manager, creates and managers a wide range of private equity funds for high net-worth accredited and qualified investors. Learn more at www.GlobalAlts.com.
- EWM Real Estate, LLC ("EWM-RE") is a real estate holding company for our headquarters.

Endowment Wealth Management Inc. is an equal opportunity employer. Candidates must be authorized to work in the United States and not require work authorization sponsorship by our company for this position now or in the future.