



67 Monroe Avenue  
Pittsford, NY 14534  
P: 585.267.4900  
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lwvadvisors.com

## **OPERATIONS ANALYST**

Operations Analyst will be responsible for providing performance reporting support to our client base. A successful candidate will need to think creatively, work in a fast-paced environment and effectively prioritize. This position provides the opportunity to work in a professional business environment, experience real-world challenges, and expand one's expertise in the field of investment management with a recognized, national leader in the investment consulting industry.

While much of the team is remote, traveling, or hybrid, this position initially requires a physical presence in the office, ensuring uninterrupted excellent service to our clients and support for the advisory team.

## **RESPONSIBILITIES**

- Generate quarterly/monthly reports for firm's institutional client base
- Reconcile monthly cash flows and performance for the institutional client base
- Provide support to the firm's research department and advisors on all portfolio analytics, including asset allocation modeling, manager peer analyses, portfolio stress testing and ad hoc research/special projects
- Compose and document manager due diligence reports
- Utilize and leverage the firm's many analytical tools and applications, while also recommending enhancements and efficiencies
- Opportunity to participate in the firm's Investment Committee meetings and manager due diligence calls
- Actively participate in compliance and efficiency efforts
- Maintain and upload data return streams within the firm's research-related software applications
- Produce and distribute weekly performance flash reports on the firm's recommended investment list, as well as market valuation reports
- Maintain pipeline list and quarterly, update funds in respective universes that firm follows
- Maintain organization of research files located on firm's server
- Document and maintain the process and procedure tutorials for all reporting related tools

## **REQUIREMENTS**

- Bachelor's Degree in business, finance, economics, or mathematics
- Strong attention to detail and organization skills
- Self-starter and the ability to think creatively and out-of-the-box
- Strong communication, interpersonal, and problem-solving skills
- Strong proficiency in all Microsoft Office Programs, specifically Excel, Word, and PowerPoint
- Experience with Morningstar, Bloomberg and Tamarac Advisor View, as plus
- Exhibits a strong desire to achieve, with a positive can-do attitude
- Professional demeanor
- Proven ability to work in a team-oriented environment



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## **ABOUT THE TEAM**

LVW Advisors, an independent Rochester-based Registered Investment Advisor is considered one of the leading investment management firms in the nation. Our team of experience financial advisors provides customized investment management solutions and comprehensive wealth management plans for institutional investors, individuals, and family offices. LVW Advisors is an award-winning firm that is consistently recognized in the industry for sophisticated investment management solutions, research capabilities and the delivery of an exceptional client experience.

For more information, visit our website at [www.lvwadvisors.com](http://www.lvwadvisors.com)

*LVW Advisors is an Equal Employment Opportunity employer Minority/Female/Sexual Orientation/Gender Identity/Individual with Disability/Protected Veteran. We welcome all persons to apply.*



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*The Art of Serious Investing*