The Quantitative analyst/AFA, will serve as the Alpha Capital strategies Investment Research, acting as subject matter expert on long-term retirement asset allocation models, capital market assumptions, and investment drawdown and distribution strategies. With these principles in mind, will guide their research into designing internal benchmarks and fund research that could lead to lineups that will outperform said benchmarks.

Providing support for the ongoing vision and development of Alpha Capital Strategies’ research division and development and growth of board of advisers for our investment committee. Training and implementation of tools and software that are used for analysis. Examples could include working with internal operations teams, desks or directly with financial advisors as a subject matter expert to understand issues they face in retirement, planning cases, and fund line up decisions and identifying ways to address their concerns.

 Creating/publishing research white papers, articles, and other content to Alpha Capital Strategies’ team of advisors regarding portfolio longevity topics such as Market strength, inflation, portfolio principles of investment, portfolio withdrawal considerations, among other topics, which tie back to our over-arching financial planning and Investment Committee philosophy.

 Play a key role providing thought leadership, including advising the Alpha Capital Strategies Investment Committee, on topics such as Quantitative models, Portfolio management, and overall Investment policy Statement standards, to help formulate and maintain long-term strategic asset allocation models. Develop consistent communication strategies to maintain accountability among board of advisers on investment committee.

Includes additional management responsibilities, such as direct people leadership of small team, strategic planning, and serving an integral role on the Investment Research Group leadership team.

**Desired Skills and Experience**

**Required Qualifications**

* Bachelor's Degree in Finance, Accounting, Investments or other relevant focus areas
* Strong communication skills - both written and verbal
* Strong quantitative skills with the ability to combine investment knowledge and technical expertise to produce effective results
* Proven ability to manage multiple priorities; ability to adapt to changing priorities
* Ability to work effectively as a part of a team
* Self-motivated; ability and willingness to seek out work and the drive to accomplish goals
* Ability to conduct business analysis and requirements gathering
* Attention to detail, logical/critical thinking and analysis skills
* Active Series 7 or the ability to obtain within 60 days
* Active Series 66 or the willingness to obtain within 120 days
* Advanced certifications such as CFA, CAIA, CFP, CIMA
* Prior experience with leadership
* exposure to portfolio management tactics and strategies
* Expertise in asset allocation, manager combinations and portfolio structuring

**Job Responsibilities**

* Work as an integral member of the product team (primarily with the senior investment analysts) on market and portfolio related analysis
* Develop and enhance real time monitors/tools to track various portfolio positions
* Assist with preparation of materials for various sector team, product team, client meetings, and marketplace information requests
* Carry out special projects on an as needed basis
* Interact with various groups within the firm as an information gathering liaison
* Executing applications on behalf of the advisor direction

**Success Factors**

* Proven ability to function independently
* Excellent oral and written communication skills
* Must be highly organized; able to multi-task
* Must excel in high paced environment to manage multiple deadlines
* Creative problem solving strategies
* Solid analytical sills
* Team player
* Proven project management skills
* Advanced skills in PowerPoint, Excel, Adobe, and SQL
* Portfolio modeling

**Your Role**Functions this role is responsible for include model generation, strategy analysis, portfolio risk analysis, and integration of new and existing quantitative tools and databases.

* Knowledge of the principles of investment analysis
* Strong analytics skills including statistics and operations research
* Strong programming skills especially in the R Language and Python is a plus but not required.
* Understanding of portfolio construction and optimization models for Alpha
* Willingness to work collaboratively with researchers across different asset classes
* Ability to gather and interpret market data from various sources such as third party and in-house databases.
* Ability to prioritize work, meet deadlines, and concentrate on details in a fast-paced work environment.
* The ability to collaborate within in a team and matrix environment is critical.