

# Title: Investment Analyst



**Location: Carmel, IN**

## POSITION OVERVIEW:

The position of Investment Analyst at Winthrop Capital Management (WCM) is an entry level position designed to provide candidates with a challenging and meaningful career in the investment management business.

The position requires a disciplined, organized, and engaged individual who can contribute positively to our culture in a team-oriented environment. The successful candidate should have the ability to think critically, assist with the investment process, work consistently within established processes, and manage and track detailed security data.

To apply, please send an updated, resume to:

Adam Coons  
10201 N. Illinois Street,  
Suite 450  
Carmel, IN 46290

Or send via email to  
[acoons@winthropcm.com](mailto:acoons@winthropcm.com)

All resumes are considered confidential.

WCM is an equal opportunity employer.

## RESPONSIBILITIES:

- Assist in the maintenance of asset allocation models and portfolio structures.
- Analyze performance and risk attributes of portfolio total return
- Detailed analysis of duration and yield calculations for securities in portfolios
- Review portfolio compliance relative to compliance rules for each account
- Build Credit models to support the analysis of securities in which we invest
- Reconcile performance numbers on a monthly basis across 500 accounts between the current performance measurement system and our proprietary performance analytics system called Wombat.
- Review security and portfolio analytics.
- Maintain risk models for portfolios.
- Provide support to portfolio managers and analysts as needed.
- Assist in quarterly client reporting process.

## SKILLS & QUALIFICATIONS:

- 1-3 years of experience in the investment industry
- Possession of bachelor's degree in finance, economics, accounting, or business
- Solid mathematics and quantitative skills
- Exceptional organizational skills
- Strong proficiency in Microsoft Excel and Word
- Desire to pursue CFA

## COMPANY DESCRIPTION

Winthrop Capital Management was founded in 2007. We implement value-oriented investment strategies in both equity and fixed income portfolios and serve both institutional and individual investors. Our goal is to provide outstanding long-term investment performance results consistent with the risk tolerance and investment constraints of each client. We seek to provide the highest level of service to our clients to help them achieve their investment objectives.

## WCM MISSION

## Investment Analyst Position

Our goal is to help our clients achieve successful financial outcomes in relation to their specific Investment Management objectives. To accomplish this, we focus on long-term goals and create solutions that will realistically help clients achieve those goals with minimum risk.

### COMPANY VALUES

Winthrop Capital Management holds itself to the following Values:

*Character and Integrity define the person*  
*Our Culture and Firm come before the individual*  
*Always do the right thing for the client*  
*Make a positive impact in someone's life every day*

### THE WCM CULTURE:

Winthrop Capital Management describes its culture in the following way:

*We recognize the need to over-communicate in order to create transparency within WCM.*  
*We seek to question and analyze to get to the truth rather than accept what is provided at face value.*  
*We believe accountability rests with a person - not a committee.*  
*We believe the value of a meeting is a function of the work that is done between the meetings.*  
*We empower the employee to take the initiative to make thoughtful decisions that benefit the company and the client.*  
*We are lifetime learners and recognize that we need to continue to learn in order to continue to grow.*  
*We hold each other accountable for our actions and initiatives.*  
*Every employee strives for excellence in all that he/she does both within the firm and for our clients.*  
*We take responsibility for our actions and will take initiative on behalf of the company and our clients.*  
*We recognize that we are all individuals and we respect each other for our differences, and encourage the continued development of each other's gifts.*

Winthrop Capital Management is an equal opportunity employer.

NOTE: This job description is not intended to be all-inclusive. Employee may perform other related duties as necessary to meet the ongoing needs of the organization.

Updated: 2/18/2025

---