

Job Title: Operations Analyst



Location: Carmel, IN

POSITION OVERVIEW:

The position of operations analyst at Winthrop Capital Management (WCM) is an entry level position designed to provide candidates with a challenging, meaningful and supportive opportunity to build a 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 contribute in a positive manner to our culture by operating consistently within established processes, holding oneself accountable, and seeking to continually learn.

To apply, please send an updated, resume to:

Gregory Hahn
10201 N. Illinois Street,
Suite 275
Carmel, IN 46290

Or send via email to admin@winthropcm.com
All resumes are considered confidential.

Winthrop Capital Management is an equal opportunity employer.

RESPONSIBILITIES:

- Assist in the design and testing of Winthrop Technology Solution's proprietary portfolio and risk analytics software called Wombat.
- Analyze account level and security level data within Wombat to ensure accuracy and data integrity.
- Maintain the morning file to integrate daily data files from custodians into the Wombat database.
- Reconcile data between WOMBAT's database and third-party systems.
- Test new code releases to ensure functional requirements, system compliance and technical specifications are adhered to.
- Collaborate effectively with software developers to identify root causes of defects, track bug resolution, and verify fixes through retesting.
- Communicate test progress and test results to project stakeholders and management.
- Act as the liaison between the Operations team and the development team.
- Analyze portfolio data using Microsoft Excel.
- Provide support to portfolio managers and analysts as needed.

SKILLS & QUALIFICATIONS:

- 1-5 years of experience in the investments or IT industry
- Possession of bachelor's degree in finance, accounting, data analytics or information systems
- Excellent analytical and problem-solving skills
- Exceptional organizational skills
- Strong proficiency in Microsoft Excel and Word
- Experience with Python or SQL is a plus.
- Strong communication and collaboration skills to work effectively with cross-functional teams.

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.

Operations Analyst Position

WCM MISSION

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 that it is important for our clients to speak into all aspects of our firm.
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.

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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.