



## **Investment Management Analyst**

### **Job Brief**

At ClearPoint, you are given the opportunity to do meaningful work aligned with your strengths, in an environment where you have a voice, are encouraged to collaborate with others, and ultimately have the chance to create your own career path.

The Investment Management Analyst will be responsible for ensuring that ClearPoint Federal Bank & Trust's investment management solutions are the best in the deathcare industry. This position will be required to provide operational, service and research support to ClearPoint's investment management initiatives. This role will require a detailed-oriented individual, who embraces change, and is willing to contribute to the strategic direction of the investment department. Collaboration, critical thinking and problem-solving are essential traits for success in this role. The Investment Management Analyst may be based in our Batesville, Indiana headquarters; Houston, Texas office; or a remote work environment.

### **RESPONSIBILITIES:**

- Support the daily investment operations of ClearPoint Federal Bank & Trust including managing liquidity, trade order processing, and periodic rebalancing of investment portfolios.
- Ensure all investment management data is timely and accurate within associated internal and external systems.
- Produce periodic investment performance and attribution reporting for customer accounts and model investment portfolios.
- Support the investment research process for internal asset allocation models including due diligence on selected sub-asset classes and third-party investment managers.
- Assist in conducting required annual investment reviews on all customer accounts.
- Support ClearPoint's business development and relationship management efforts by being an internal resource on model investment portfolios and financial market conditions.
- Contribute to ClearPoint's investment thought leadership in monthly market updates and client communications.
- Support ClearPoint's interest rate forecasting activities for the bank balance sheet, product offerings, and budgetary needs.
- Maintain behaviors consistent with high performance and supportive team dynamics.
- Assist on team projects and additional duties as determined based on business needs.
- Assure comprehensive knowledge and compliance with all Bank policies, procedures, products and support systems and all applicable state and federal banking laws, rules, and regulations.

### **REQUIREMENTS:**

- Strong attention to detail and accuracy combined with the ability to quickly comprehend new topics
- Demonstrated effective communications skills with internal and external customers
- Demonstrated computer proficiency, particularly in the use Microsoft Office, experience with Morningstar Direct is a plus
- Work respectfully with all team members in a collaborative environment
- Be willing to learn new skills, adapt to changing work priorities and shift focus as needed
- Bachelor's degree from an accredited institution; accounting, business, or finance preferred
- Two to five years of related work experience; investment operations or research preferred