Entry-Level Investment Operations Associate (Degree Required; Training Provided)

Overland Park, KS · Full-time · **$55k–65k**

Entry-Level Investment Operations Associate (Degree Required; Training Provided)
Location: Overland Park, KS
Salary: $55,000 - $65,000 + Quarterly Bonus Opportunities
Benefits: Health Insurance w/ HAS Contributions, 401(k) w/match, PTO, Parental Leave, Professional Development + More!
Job Type: Full-Time | On-site
Typical Hours: Monday – Friday, 40 hours/week
Start Date: ASAP
Sponsorship is not available

Entry-Level Investment Operations Associate Description

Our client in financial services is looking for an Entry-Level Investment Operations Associate to join their team in Overland Park, KS. This is an opportunity for a recent graduate or someone looking to begin a career in investments, with no previous financial services experience required. You'll join an experienced investment team and receive hands-on training in portfolio trading, investment operations, and portfolio analysis. Over approximately 12 months, you'll progressively take on more responsibility as you develop the skills needed to execute trades and manage routine portfolio activities. Ideal candidates will have a degree, and possess strong analytical abilities, with a genuine interest in financial markets. To succeed, you must be detail-oriented, curious, and motivated to learn, with a willingness to study independently for required securities licenses. This is a great opportunity to build a foundation in investment management at an established, growing firm offering professional development and opportunities for increased compensation as your licensing, skills, and responsibilities progress.

Entry-Level Investment Operations Associate Responsibilities

- Obtain required securities licenses within the first 4 months of employment
- Study independently outside work hours; receive exam fee reimbursement upon passing
- Learn investment and trading operations and portfolio management procedures
- Assist with trade execution under the guidance of experienced investment professionals
- Support portfolio rebalancing, asset allocations, and cash management
- Review investment data and transactions for accuracy
- Prepare investment reports and portfolio analyses using Excel
- Participate in investment team meetings and market discussions
- Progress toward independently handling routine trades over approximately 12 months

Entry-Level Investment Operations Associate Qualifications

- Bachelor's degree in Finance, Economics, Business, or a related field required
- Familiarity with investment products (stocks, bonds, mutual funds, ETFs) required

- Proficiency with Microsoft Excel required
- Willingness to obtain required securities licenses within 4 months required
- Strong analytical and critical-thinking skills required
- Excellent attention to detail and organizational skills required

Apply: https://twonice.hire.trakstar.com/jobs/fk0zlkm/?apply=true

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