



Job Posting

Position: Associate Analyst
Applications Until: 4/30/2021
Start Date: Flexible
Location: Lincoln, NE

Who we are:

Pittenger & Anderson is a fee-only Registered Investment Advisor (RIA) based in Lincoln, Nebraska. We manage more than \$2 billion for 700+ individuals, families, and organizations across 33 U.S. states. Since 1995, we have existed for one purpose...to help our clients live the life they've always imagined. We are a fee-only registered investment advisor (RIA) and a full-time fiduciary, meaning we advocate for your best interests day in and day out. Our approach results in shared success. The DNA of this company rests on three principles: transparency, collaboration, and treating clients with dignity.

What you will do:

You will be expected to perform at a high level in a fast paced, open office environment. You will engage in research and trading of various securities, including mutual funds, ETFs, stocks, and bonds. You will participate in client meetings reviewing their portfolios and other aspects of their financial lives. Over time, you will help contribute to marketing and business development activities of the firm.

Associate Analyst responsibilities:

- Perform due diligence reports on mutual fund and ETF managers
- Present research and participate in discussions regarding securities held in client portfolios
- Monitor and report on the performance of securities and client portfolios
- Participate in our portfolio review process and subsequent client reporting
- Trade mutual funds, ETFs, stocks, and bonds through various platforms
- Support advisor-client relationships by processing client service requests
- Participate in all-staff meetings including strategic planning and business development
- Assist with various firm projects requiring your attention, including production of marketing materials and client reports

Who you are:

- You have (or are pursuing) a bachelor's degree and are willing to pursue the CFA Charterholder Program
- You are motivated, proactive, and detail-oriented
- You embrace change and crave constant learning

- You are sociable, engaging, and confident (you will spend a lot of time collaborating with co-workers and presenting to clients)
- You enjoy using (and possibly building) software and other technology products

Benefits:

In addition to a competitive salary, we offer these additional employee benefits:

- Company retirement plan
- Bonus and Incentive Pay opportunities
- Paid vacation and sick time
- Major/NYSE holidays off
- Health insurance
- Professional development assistance

How you can apply:

You can apply through one of the following avenues:

- Our [Indeed.com job posting](#)
- Our [Handshake job posting](#) (for students from Creighton, UNL, UNO, and Nebraska Wesleyan)
- Or by emailing your resume and cover letter to Jon Sevenker (support @ pittand.com)