

## Investment Analyst

### **The Position:**

We currently seek an Investment Analyst with excellent analytical skills and average relational skills to do a broad range of investment related roles. The primary skill we seek for this position is the ability to understand investments, trading, rebalancing, portfolio management, data, and advanced spreadsheet skills. This is a part-time position requiring 5 to 10 hours per week.

### **Responsibilities:**

- Execute weekly trading and rebalancing
- Perform routine due diligence on managers, custodians, and vendors
- Periodically re-evaluate investment allocations and model portfolios
- Proactively monitor gains and loss harvesting
- Work collaboratively with team members
- Confidently deliver advice to clients via conference call or face-to-face meetings
- Structure advice and counseling around the big strategic financial picture
- Maintain high ethical standards, confidentiality and professionalism at all times

### **Qualifications:**

- Has a deep understanding and love for of economics, finance, and investments
- Advanced Excel skills
- Ability to take the initiative to identify gaps in operational process and implement new innovative solutions that are relevant to the industry
- Excellent communication both in written and person to person
- Drawn to a Holacracy, a non-hierarchical organizational operating system
- Has a personal management system or willing to learn “Getting Things Done” method
- Willing to learn Non-Violent Communication
- Wants to work in a culture that emphasizes self-development practices
- Able to analyze technical data and devise sophisticated investment strategies
- Does not view themselves as above doing any task or accountability
- Takes personal responsibility and keeps agreements
- Ability to think critically, identify and find solutions to client’s need
- Able to meet deadlines
- Has CFP®, CPA or CFA.

### **Benefits:**

- Incentive based gross revenue bonus program
- Career track available with opportunities for advancement
- 401K Plan and Profit Sharing Plan
- Flexible working schedule
- Competitive hourly pay

**The Company:**

We are a growing 35 year-old, fee-only financial life planning company. We offer an unique “[Holacratic](#)” culture and a reputation for excellence, established clients and growth potential to help you reach your personal and career goals. Our culture offers autonomy, effective meetings, efficiency, responsiveness, a voice in company policies and direction, flexibility, an alignment of work with purpose, and personal and professional growth.

Our employees are as important as our clients, and we work to provide both with a collaborative atmosphere and learning environment. We empower our employees through a unique governance structure ([Holacracy](#)) where each person has responsibility and autonomy over decisions as they relate to the domain and accountabilities of the role(s) they fill within our company.

*The core purpose of our company is to transform the financial and emotional well-being of people.* This includes our clients and ourselves.

Our core values are authenticity, unbiased advocacy, well-being, and continuous improvement. We put our values into action by:

1. Putting clients first
2. Guiding people to reach a destination in an unfamiliar area
3. Giving sound advice and creative solutions
4. Constantly educating ourselves
5. Personally practicing what we preach
6. Taking clients only where we have gone ourselves
7. Being serial innovators
8. Taking personal responsibility for our actions and contributions

No phone calls please. If interested, please send resume and cover letter to [rick@kahlerfinancial.com](mailto:rick@kahlerfinancial.com).

In your cover letter please tell us:

- We are curious about what attracts you to Kahler Financial Group.
- What does “to transform the financial and emotional wellbeing of people” mean to you?
- Tell us what you will bring to Kahler Financial Group.
- We are wondering about what you need most from Kahler Financial Group.
- Tell us what salary range you expect to receive.
- We are curious about what would attract you to Rapid City other than working at KFG.

*We are an equal opportunity employer. Selected candidate may be required to pass a drug test and background check and may be asked to complete personality and/or competency tests.*

**The City:**

Pursuing a career in financial planning in Rapid City, South Dakota means you will enjoy the best of all worlds; great quality of life, low personal taxes, and a low cost of living.

Rapid City has an outstanding [atmospheric](#) and [cultural](#) climate, making it one of the best kept secrets in the US.

Nestled at the foot of the beautiful Black Hills, Rapid City is the perfect location for those who love the outdoors. It was rated the #3 top town for sportsmen by [Outdoor Life](#) magazine in 2011 and one of the top 25 cities to raise an outdoor kid by Backpacker Magazine. Rapid City is tied with Ft. Meyers, FL for having the best air quality of any city in the United States.

With summer and winter skiing, rock-climbing, hunting, fishing, boating, and more trails than a person could hike in their lifetime all within an hour's drive, Rapid City is the perfect location for those who love the outdoors.

Our residents enjoy the many tax and business advantages of doing business here. And when the cost of doing business is low, so is the cost of living. Consider that South Dakota has:

- **NO** Corporate Income Tax
- **NO** Personal Income Tax
- **NO** Personal Property Tax
- **NO** Inventory Tax
- Low cost of living, .81 of the national average
- The 2nd lowest state per capita taxes in the nation
- Fourth lowest overall crime rate in the nation
- An average commute time of 13.8 minutes
- Number one high school graduation rate in the nation

Rapid City features a [steppe climate](#) ([Köppen BSk](#)). Its location makes its climate unlike both the higher elevations of the Black Hills and the Great Plains to the east. It is characterized by long arid summers and mild, dry winters, with short but distinct spring and autumn seasons.