Portfolio Analyst/Manager
The responsibilities of this position include structuring and rebalancing client portfolios on a daily basis, responding to clients and associates regarding portfolio composition, researching securities for inclusion in client portfolios, and serving on the Investment Committee. Skills desired include financial statement analysis, extensive knowledge of financial markets and instruments, and ability to use industry specific software. Candidates must be competent in verbal and written communication, detail oriented, thoughtful, and thorough. This position reports to the firm president.

Requirements

- Bachelor’s Degree
- 5+ year’s industry experience
- FINRA Series 7 & 63
- CFA charterholder preferred

Bragg Financial Advisors
Bragg Financial Advisors is a Registered Investment Advisor in Charlotte, North Carolina managing $1.4 billion in client assets for high net-worth individuals and institutions. Bragg Financial offers fee-based investment management and financial, tax, and estate planning for wealthy families and provides consulting and investment selection, monitoring, and due diligence for companies, endowments, and private foundations. Bragg Financial also serves as investment advisor to the Queens Road Funds.

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To Apply
Please send your resume to Matt DeVries at matt@braggfinancial.com