

Veris Wealth Partners Research Analyst

Company Summary

Veris Wealth Partners is an independent, SEC registered, impact wealth management firm founded in 2007 by five partners who share a deep conviction in the interdependence of values and wealth. Veris believes in managing this interdependence with knowledge and intention, ultimately delivering benefits to clients, companies and the world by investing in companies focused on sustainability and Environmental, Social and Governance (ESG) principles. Veris clients include individuals, foundations, non-profit organizations, family offices, and investment advisory firms.

Veris is recognized as both a pioneer and leader in the field of responsible and sustainable investing, and is strongly equipped to provide solutions for clients seeking to create change through their wealth while meeting financial objectives. As the business argument for sustainable solutions to global problems is gaining significant acceptance, corporations and individuals are viewing their own practices and those of others with new expectations. Veris believes companies committed to these practices can deliver competitive market performance, while mitigating risk for investors. At Veris, this philosophy of aligning wealth with values to create meaningful impact is central to the company's identity and culture.

Veris is a proud B Corp and [Best for the World®](#) Overall Honoree (2019, 2018, 2017, 2016, 2015, 2014, 2013).

Veris has offices in New York City, San Francisco, Portsmouth, NH, and Boulder, CO. For more information, please visit our website: www.veriswp.com.

Position Summary

The Research Analyst will be primarily responsible for conducting investment manager and fund due diligence, preparing analysis, and making recommendations to the research team and investment committee. Additional responsibilities include thematic research as well as impact metric monitoring and reporting. Reporting directly to the Senior Research Analyst, the Research Analyst's duties will include supporting the firm's Investment Committee and Investment Working Group.

The Research Analyst will be able to articulate our investment philosophy, services and impact investing vision, and will write articles and papers on impact investing topics for both internal and public distribution. The Research Analyst will attend and represent Veris at industry related events.

Core Duties and Responsibilities

Investment Manager and Fund Due Diligence

- ✓ Conduct ongoing due diligence on all approved managers and funds
- ✓ Monitor and report on quarterly fund performance
- ✓ Manage pipeline of new managers/funds
- ✓ Perform due diligence on new managers/funds
- ✓ Prepare and present investment memo for new manager/funds
- ✓ Manage digital files and records of investment manager materials

Impact Measurement and Management

- ✓ Track and analyze impact metrics reported by managers and funds
- ✓ Assist in preparing firmwide and client level impact reports
- ✓ Participate in industry groups developing impact metrics

Impact Investing Articles and Papers

- ✓ Collaborate with teams drafting Impact Investing papers for external distribution

Wealth Management Team Support

- ✓ Provide manager and fund research to wealth management team

Consulting

- ✓ Participate in Impact Investment consulting teams as needed

Additional

- ✓ Support new client prospecting efforts
- ✓ Assist in various ad hoc projects
- ✓ Participate in all firm required training and compliance programs
- ✓ Attend local impact investing and financial industry events
- ✓ Expand investment financial and impact knowledge through ongoing education
- ✓ Participate in the Veris Investment Working Group and record minutes for Investment Committee
- ✓ Follow all firm compliance procedures
- ✓ Maintain awareness and knowledge of business-related news, articles, etc.

Education/Experience/Skills

- ✓ Bachelor's Degree required preferably in Economics or related subject
- ✓ 2-5 years investment research experience required
- ✓ MBA or CFA preferred
- ✓ Investment experience and knowledge of ESG data preferred
- ✓ Knowledge and experience with impact investing products and solutions preferred
- ✓ Commitment to impact investing and/or the advancement of environmental and social sustainable practices

- ✓ Detail oriented
- ✓ Demonstrated aptitude for qualitative and quantitative analysis
- ✓ Strong oral and written communication skills
- ✓ Advanced skills in Microsoft Office, Word, Excel and PowerPoint essential
- ✓ Experience with Morningstar Direct, Envestnet, and Salesforce helpful
- ✓ Exceptional interpersonal skills
- ✓ Passion for achievement
- ✓ Entrepreneurial spirit
- ✓ Life-long learner

Compensation and Benefits

Compensation will be determined by a number of factors including educational background and experience. Veris Wealth Partners has a generous benefits package including health, disability and life insurance, and the opportunity to participate in the firm's 401k retirement plan.

Veris is committed to creating a diverse environment and is proud to be an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or veteran status.

Application Instructions

To apply, please submit your resume and a cover letter outlining your specific interest in this opportunity to David@newlevelresources.com with *NY Veris / Research Analyst* and your name written in the subject line. Resumes will be reviewed as received.