



AFTER THE BELL

THE NEWSLETTER OF CLEVELAND FINANCE

SEPTEMBER 2015

INSIDE THIS ISSUE

Message from the President 1

Golf Outing 2-3

Programming 4-8

Membership 9

Education 10

Advocacy 11

Career Services 12-13

Dear Fellow Society Members and Stakeholders,

It is an honor to serve as the next President of CFA Society Cleveland. My predecessors have been fantastic stewards of our Society, resulting in CFA Institute recognizing CFA Society Cleveland as one of the premier societies in the world. I would like to thank them for their service, as well as the service of the Board and Committee members over the years, as our success is truly a team effort. Additionally, our strong and active membership has always been instrumental in the success of CFA Society Cleveland, and I would like to thank you for your strong engagement and interest in Society activities.

As we begin a new fiscal year, I thought it would be important to reiterate the mission statement of our Society: "To promote professional development, ethics, and awareness through outreach to and engagement with the financial community." The Board takes this mantra very seriously, and one of the collective goals for the new fiscal year is to drive the meaning of this mission statement through a tangible increase in member value and engagement.

We plan to offer a high quality event calendar with traditional luncheon speakers as well as several new ideas with the hope of increasing value and engagement. The traditional luncheon programming schedule is quickly filling up with the high quality speakers that you expect.

Our Programming Committee has also introduced several Luncheon Panel discussions on a variety of relevant topics including: Mergers & Acquisitions in a Rising Interest Rate Environment, Private Equity Investing, and the Impact of the Presidential Election on Corporate Transactions and the Economy. Additionally, the Society is proud to announce our Women in Leadership Speaker Series. These programming events will include panel discussions on promoting women's leadership; the importance and the impact of female investors; and the benefit of corporate board diversity. These two new luncheon tracks will augment the traditional single speaker luncheon event that you've come to expect.

Finally we will continue to offer evening networking events at various venues around town. The first will be at the Cleveland Museum of Art on the evening of September 30th with a short presentation from an executive from Sotheby's Auction House on Fine Art Collectibles.

We look forward to seeing you at one of these many exciting events. Please see our website for registration information.

I'd be remiss if I didn't mention how excited the Board is to have Cindy Nace, our Executive Director, back for a second full year. In her 18 month tenure with the society she has become the heart and soul of CFA Society Cleveland. If you haven't met Cindy yet, please introduce yourself to her at an upcoming event. You will be glad that you did. Welcome back Cindy!

I look forward to another successful year for CFA Society Cleveland and hope to see you at one of our many events. There are many ways to contribute, build relationships, add value, and further your personal and professional goals through our Society. Please let us know if you are interested in learning more about getting involved. Feel free to contact me with any questions, comments, concerns, or hopefully, kudos.

Sincerely,
Tom Jalics, CFA
Phone: (216) 509-2272
Email: president@cleveland.cfasociety.org

Check us out on LinkedIn,
Twitter, Facebook and YouTube



CFA Society Cleveland
24199 Lyman Blvd.
Shaker Heights, Ohio 44122
216-696-8066

GOLF OUTING SPONSORSHIP

CFA Cleveland would like to thank our 2015 Golf Sponsors

POWERSHARES®



WESTFIELD GROUP
Sharing Knowledge. Building Trust.®



RBC Global Asset Management

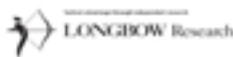
ANCORA ADVISORS



CLEVELAND RESEARCH COMPANY

COWEN AND COMPANY

FAIRPORT ASSET MANAGEMENT



STIFEL



email cfa@cleveland.cfasociety.org for 2016 Sponsorship Opportunities

2015 GOLF OUTING

16th Annual Harry W. Millis Golf Outing was another successful day with golfing, networking, and great food and drink, at Lake Forest Country Club. Thanks to the 75 golfers and 24 sponsors. We want to give a special thanks to our Title Sponsor, Powershares. Congratulations to the winning foursome of Dennis Markey, Blackrock, Jerry Bielek, Blackrock, Ron Ulle, Bank of New York Mellon, Craig Steinbrink, St. Clair Advisors. We look forward to seeing everyone next year!



Congratulations to all of our contest winners!

PROGRAMMING

CFA Society Cleveland presents... Women In Leadership Speaker Series

The CFA Society of Cleveland is hosting its first Women in Leadership speaker series, that will include executives from Fortune 500 companies, top national professional firms and those who have played key roles in helping the advancement of females. The events will run throughout the luncheon season and span an array of current and interesting topics for both men and women, including the current environment and its impact on various aspects of the market, diverse Boards as a key to success, and the importance and impact of female investors. Speakers will include Mary Catherine Sinclair, Director at Strategas Research, Heather Ettinger, Managing Partner at Fairport Asset Management, Maryrose Sylvester, CEO at GE Lighting, Jackie Acho, President at The Acho Group, Kathie Barr, Board Member at various mutual funds, and Dr. Loretta Mester, President & CEO of the Federal Reserve Bank of Cleveland.

September 24, 2015	Mary Michelle Lau, CFA, VP Senior Investment Strategist, PNC	Register Here
October 28, 2015	Mary Catherine Sinclair, Director at Strategas Research	Register Here
November 18, 2015	Heather Ettinger, Fairport Asset Management	Register Here
December 9, 2015	Maryrose Sylvester, President & CEO, GE Lighting	Register Here
April 27, 2016	Jackie Acho, Ph. D, The Acho group	Registration to follow

[Registration for all events available soon!](#)

CFA Cleveland coming events...

September 24	Mary Lau, CFA, PNC, Drilling Down on MLP's	Register Here
September 30	Cleveland Museum of Art and Sothey's, Private Wealth Event	Register Here
October 7	Private Equity Panel	Register Here
October 14	Jim Powers, CFA, The Arbitrage Fund	Register Here
October 28	Mary Catherine Sinclair, Strategas	Register Here
November 4	Michael Gayed, CFA, Pension Partners	Register Here
November 11	Lunch at Thompson Hine with Tony Kuhel	Register Here
November 18	Heather Ettinger, Fairport Asset Management	Register Here
December 2	Panel Discussion on The Impact of the Presidential Election on M&A	Register Here
December 9	Maryrose Sylvester, GE Lighting	Register Here

PROGRAMMING

CALENDAR OF EVENTS



September 24, 2015 THURSDAY
Mary Lau
PNC

[Register Here](#)

Women In Leadership Series Featuring Mary Lau, Vice President Senior Investment Strategist and Team Lead, PNC Asset Management Group, Drilling Down on MLPs - The Current and Future State in a Low Oil Price Environment, THURSDAY, September 24, 2015

Joint Event with CABA
Please note this is held on Thursday, September 24, 2015

Mary Michelle Lau, CFA® Vice President Senior Investment Strategist and Team Lead

Mary is senior investment strategist and team lead for Investment & Portfolio Strategy for PNC Asset Management Group. Mary provides asset allocation and portfolio construction research and recommendations with a focus on equities. She is also the portfolio manager for the PNC MLP Strategic Portfolios and provides coverage of the approved list of Master Limited Partnerships (MLPs). Additionally, Mary authors proactive topical commentary and in-depth white papers and overseas equity risk management and security-related publications. Mary is a member of PNC's Portfolio Construction committee, which designs, monitors and supports the various model portfolios utilized throughout asset management.

Mary's background includes fifteen years as a valuation analyst, covering both the public and private sectors. Mary was an equity research analyst with KeyBanc Capital Markets and a senior valuation analyst with Apple Growth Partners. Most recently, Mary was the chief financial officer and compliance officer for Astor Asset Management LLC.

Mary is actively involved with the CFA Institute and assists the board of directors of the CFA Society of Cleveland.

She graduated Magna Cum Laude from Miami University in Oxford, Ohio with a Bachelor of Science in Finance. Mary earned the Chartered Financial Analyst (CFA®) and Accredited Valuation Analyst (AVA) designations. Mary joined the PNC team in 2012.

Membership Renewal

Thanks to all the CFA Institute members and our local CFA Cleveland members who have renewed their 2015-2016 memberships.

For those members who need to renew, Institute members please visit the [CFA Institute website](#) and local members email cfa@cleveland.cfasociety.org.

Renewals need to be paid to continue attending programming.

PROGRAMMING



September 30, 2015 5:30 to 7:30 PM

CFA Society Cleveland, Cleveland Museum of Art, & Sotheby's - Trends in the private art & collectibles markets

- "Picasso Sells for \$179 million, breaking record" (May '15).

- "Record private art collection set for auction, expected to fetch \$500 million" (September '15).

Recent news headlines show record gavel prices being recorded at major auction houses. What is driving these trends? Join us for an evening of great food, drink, and emerging trends in the world of private art with one of Sotheby's premier experts. We are pleased to host an evening event for CFA Society Cleveland members and select guests at the spectacular Cleveland Museum of Art. Nina del Rio, Senior Vice President and Head of Department Museum Services for Sotheby's New York will be sharing with us the latest trends emerging in the world of private art and collectibles market.

Nina del Rio joined Sotheby's in 1988 and has been in her current position since 2003, where she regularly consults with private collectors and institutions. Under her direction, Sotheby's has been privileged to offer the majority of American institutional collections that have come to market. Ms del Rio began her career with Sotheby's as a Cataloguer in the Prints department. After a brief hiatus working at the Marlborough Gallery publishing prints, she returned to Sotheby's in 1995 to become Director of the Contemporary Prints department. In 1999, she began working on the launch of Sotheby's online auction site and managed different aspects of Sothebys.com until moving to Museum Services. Ms del Rio graduated cum laude from Tufts University with a Bachelor of Arts degree in Art History. She studied at the École du Louvre in Paris for one year, after which she worked at PS1 in Long Island City, New York.

The evening will commence with cocktails and mingling at the beautiful CMA. Hors d'oeuvres and a selection of beverages will be provided; supplied by Provenance. Ms. del Rio will then commence a brief presentation followed by a Q&A session. Upon completion, guests will be free to tour the CMA galleries until close or gather at Provenance for more food, drink, and discussion.

5:30 to 6:15 PM Cocktails and hor d'oeuvres

6:15 to 7:00 PM Nina del Rio, Sotheby's

7:00 to 9:00 PM Explore the Museum, enjoy cocktails and dinner at Provenance

[**Register Here**](#)

Nina del Rio

Nina del Rio joined Sotheby's in 1988 and has been in her current position since 2003. Under her direction, Sotheby's has been privileged to offer the majority of American institutional collections that have come to market.

Ms del Rio began her career with Sotheby's as a Cataloguer in the Prints department. After a brief hiatus working at the Marlborough Gallery publishing prints, she returned to Sotheby's in 1995 to become Director of the Contemporary Prints department. In 1999, she began working on the launch of Sotheby's online auction site and managed different aspects of Sothebys.com until moving to Museum Services.

Ms del Rio graduated cum laude from Tufts University with a Bachelor of Arts degree in Art History. She studied at the École du Louvre in Paris for one year, after which she worked at PS1 in Long Island City, New York.

PROGRAMMING

**OCTOBER 7, 2015
PRIVATE EQUITY PANEL**



**Mike Faremouth
Linsalata Capital**



**Jeff Kadlic
Evolution Capital**



**Chip Weinberg
Weinberg Capital**

Panel Moderated by

**Becky White:
Western Reserve Partners**

Private Equity Panel, featuring Mike Faremouth, Linsalata Capital, Chip Weinberg, Weinberg Capital and Jeff Kadlic, Evolution Capital, and Moderated by Becky White, Western Reserve Partners, October 7, 2015 [Register Here](#)

The Oct 7th Private Equity Panel brings together local private equity professionals from renowned firms Linsalata Capital Partners, Weinberg Capital Group, and Evolution Capital Partners. Rebecca White, from Western Reserve Partners, will lead the panel in a discussion on local and global trends in each firms respective verticals. The event will offer a unique perspective on consumer goods, manufacturing, healthcare, and education business lines.

Mike Faremouth, Managing Director, Linsalata Capital

Mr. Faremouth's responsibilities include acquisition searches, due diligence, negotiations, financing and portfolio company oversight. He serves as Chairman of Hospitality Mints Holding Company and Transpac Holding Company.

Prior to joining Linsalata Capital Partners in 2005, Mr. Faremouth spent two years at the Matco Tools subsidiary of Danaher Corporation where he was a Product Manager. While there, he was responsible for profit and loss, new product introductions, market research and business strategy for the Hand Tools product category. Mr. Faremouth began his professional career at Ernst & Young where he spent six years and rose to the level of Manager. At Ernst & Young, he spent four years in the Audit practice working on manufacturing and distribution companies followed by two years in the Litigation Advisory Services practice working on lost profits analysis and post-acquisition disputes.

Mr. Faremouth has a Bachelor of Business Administration degree from the University of Michigan and an M.B.A. from the Darden School of Business at the University of Virginia.

Jeff Kadlic, Co-Founder and Managing Partner, Evolution Capital

Jeffrey Kadlic spent the first 10 years of his career making private investments in an institutional setting. Early success was achieved in large part to an entrepreneurial mindset within a corporate culture. While practicing as an institutional investor, working in and around dynamic small businesses, he recognized that growing small businesses needed more than just an influx of cash to scale operations. Leveraging corporate practices within an entrepreneurial setting, in addition to the capital, was the best way to achieve great performance.

Connected by their passion for growing small companies, in 2005, he and partner, Brendan Anderson, co-founded Evolution Capital Partners, focused exclusively on advising and investing growth capital in Second Stage Companies.

Jeffrey also co-hosts The Second Stage, a weekly online radio program serving the entrepreneurial community as a forum to exchange ideas and best practices, with his partner Brendan Anderson.

Chip Weinberg, Managing Director and Principal, Weinberg Capital

Mr. Weinberg is responsible for the firm's operations and is actively involved in working with the management of portfolio companies, frequently acting as the liaison between the Board and management. He works closely with management to pursue new business opportunities and to set strategic direction and financial goals.

Prior to joining WCG, Mr. Weinberg was President of New Channel Direct, a full service mailing and marketing company based in Brunswick, Ohio. Mr. Weinberg has also served as Managing Director of Global Acquisitions and Business Development for Hawk Corporation (AMEX: HWK), a manufacturer of specialized components used in the aerospace, industrial and specialty consumer markets. At Hawk, Mr. Weinberg was responsible for the successful completion of six acquisitions, substantially adding to the company's sales and profitability. Mr. Weinberg was also responsible for building Hawk's first manufacturing facility in China. Prior to joining Hawk, Mr. Weinberg was an Assistant Attorney General for the state of Ohio under the term of Attorney General Lee Fisher. Mr. Weinberg graduated from Northwestern University with a B.A. in Philosophy and received his Juris Doctorate from Southern Methodist University School of Law. At Southern Methodist University, Mr.

Weinberg served as the Associate Senior Editor of the International Law Journal.

PROGRAMMING

CALENDAR OF EVENTS



Jim Powers, CFA
Water Island Capital
October 14, 2015

[Register Here](#)

Jim Powers, CFA, Portfolio Manager, Water Island Capital, The Arbitrage Funds, October 14, 2015

Lunch Sponsored by The Arbitrage Funds



Jim will discuss the specific strategies that his Event-Driven Credit team oversee and provide insight into the thought process that his team of managers employ in the ever changing event-driven space of merger arbitrage. He will provide some examples that are currently working and give his view of the current environment of M&A, the opportunities he sees going forward and what effect the FOMC and interest rates would have as we head into end of 2015 and the new year.

James Powers **Portfolio Manger**

James joined Water Island Capital in 2011, and he evaluates event-driven and arbitrage investment opportunities in the credit markets. He has held senior positions with Torchlight Investors and Neuberger Berman, where he analyzed investment grade and high yield corporate credit, including bank debt, corporate bonds, and convertible securities. James received an MBA in Finance from New York University and a Bachelor's degree in Economics from Union College. He achieved the Chartered Financial Analyst designation in 2002

Join CFA Society Cleveland

Did you know you can join CFA Society Cleveland as a local member and do not have to be a CFA Charterholder? Join at one of our three local membership levels and attend are events at no charge!

Regular Local Member \$150 for the year

Candidate Member \$125 for the year

Student Member \$100 for the year

[Apply Here](#)

MEMBERSHIP

Cindy Nace Executive Director CFA Society Cleveland



Cindy is the Executive Director of CFA Cleveland. She has a background in marketing and events management and has been with the society since 2013.

MEMBERSHIP SPOTLIGHT

Cindy Nace, Executive Director CFA Society Cleveland

1. How long have you been part of CFA Society Cleveland?

I have been with CFA Cleveland since December 2013. I was the Executive Administrator through June 2015 and now the board has named me Executive Director and I will be taking on a larger leadership role.

2. What has surprised you about the society since you have been involved?

What has surprised me the most about CFA Society Cleveland is the commitment our Charterholders have made to achieving the charter. Candidates commit to an incredible amount of time to earn the charter. I was also surprised at the diverse backgrounds our charterholders and CFA Cleveland local members come from. Our local membership allows Clevelanders to join the society, as non-Charterholders and take advantage of all the programming we have to offer.

3. What should people know about CFA Society Cleveland that they might not know?

I would like people to know that we hold about 35 events a year and you do not have to be a member to take advantage of all the programming we offer. You can attend events as a non-member or join the local society as a non-charterholder.

4. Describe the typical society member?

CFA Society Cleveland has 500 members. 404 CFA Charterholders, 36 CFA Affiliate members and 60 Local Members, including regular local members, candidates and students. Our society is made up of 86% men and 14% women. The typical society member works in the financial services industry.

5. What society events are you most proud of being involved with?

The Cleveland society puts on about about 35 events a year, that range from lunches, golf outings, to happy hours to onsite company tours. The events I have enjoyed the most are the networking events where members can talk to each other, and events where we are able to bring a diverse crowd together to learn from an industry expert. Last week we held an event, Investing In Your Career. This event allowed about 65 of the areas top college students to interact with eight Cleveland area employers. CFA Cleveland is very lucky to have the support of the employers and universities.

6. Five years from now, what will be different about CFA Society Cleveland?

My goal in 5 years is to establish CFA Society Cleveland as the source for financial information in Cleveland, and to increase our brand awareness in Cleveland. I would like a majority of people in the business community in Cleveland to recognize the CFA name and the knowledge and expertise it stands for. I would like to increase attendance of non CFA Charterholders and members, at our events. CFA Cleveland offers a wide range of speakers that appeal to business people across all disciplines that can learn from the many speakers and events we offer.

EDUCATION



Coming Events...

CFA Institute Research Challenge



Kaplan Schweser Exam Preparation Materials

2016 CFA Society Cleveland Research Challenge - Calling all colleges to participate

We are excited to invite you to participate in the CFA Society's annual Research Challenge. Last year we had a very successful event, with seven Northeast Ohio university teams participating! We are looking forward to making this year another successful one, and are pleased to announce that this year's challenge will involve the analysis and recommendation of Signet Jewelers. Signet Jewelers Limited is the largest specialty jewelry retailer in the US, UK and Canada. Signet operates approximately 3,600 stores primarily under the name brands of Kay Jewelers, Zales, Jared The Galleria Of Jewelry, H.Samuel, Ernest Jones, Peoples and Piercing Pagoda. The company's annual sales of approximately \$6 billion derive from the retailing of jewelry, watches and associated services. We are very appreciative to them for supporting the event this year.

Presenting Company: Signet Jewelers Limited

Location of Presentation: Akron Ohio

Tuesday, October 27th, from 11-12:30.

Formal presentations for the competition will take place on Saturday February 20th, 2016.

The CFA Institute Research Challenge is a competition between university-sponsored Teams that research a designated publicly traded company, prepare a Written Report on that selected company and then present their findings to a panel of Judges. The competition has three levels: Local, Regional, and Global. Winners at the Local level advance to compete against Teams within their geographic region at the Regional level. Winning Teams at the Regional level advance to compete at the Global level. One Team is designated the ultimate winning Team, or Champion, at the Global level.

2016 CFA Institute Research Challenge Rules

Please email cfa@cleveland.cfasociety.com to participate in this years challenge

Kaplan Schweser 2016 Exam Preparation Material Now Available, 15% Discount through CFA Cleveland

Kaplan Schweser Registration Form

ADVOCACY



POLICY BRIEF

HFT: VIEWS OF INVESTORS

CFA Institute staff have tracked the evolution of high-frequency trading (HFT) in global capital markets, with a view toward understanding potential impacts on market quality and integrity as well as to inform our perspectives on public policy and regulatory initiatives.

INVESTOR CONCERNS

The primary concerns about HFT are whether firms engaged in this type of trading also:

1. may engage in abusive trading strategies;
2. are not subject to capital and transparency requirements that are typically required of traditional market makers;
3. deploy algorithms that, if not robustly tested, have the capacity to destabilize markets;
4. take advantage of superior market data (proprietary data feeds that operate with lower latencies than the consolidated quote and tape) and proximity to exchange matching engines (co-location) to execute ahead of other market participants;
5. may have contributed to a reduction in the depth and breadth of liquidity that could exacerbate market sell-offs like the May 2010 Flash Crash.

CFA INSTITUTE COMMENTARY

- [2015 Comment letter to European Securities and Markets Authority on MiFID II](#)
- [2014 Comment letter to European Securities and Markets Authority on MiFID II](#)
- [2012 Comment letter to European Commission ECON Committee on MiFID Rule Reforms \(question 8\)](#)
- Research Paper: [Dark Pools, Internalization, and Equity Market Quality \(2012\)](#)
- [2011 Comment letter to IOSCO on Regulatory Issues Raised by the Impact of Technological Changes on Market Integrity and Efficiency](#)
- [2010 Comment letter to CESR on Microstructural Issues of the Equity Markets](#)
- [2010 Comment letter to SEC on US Equity Market Structure Concept Release](#)
- ["HFT, Price Improvement, Adverse Selection: An Expensive Way to Get Tighter Spreads?"](#) (Market Integrity Insights blog post)
- ["HFT Cause and Effect: What Is the Role of Exchange Industry Economics?"](#) (Market Integrity Insights blog post)
- ["Debating Michael Lewis' 'Flash Boys': High-Frequency Trading Not All Bad"](#) (Market Integrity Insights blog post)

CFA INSTITUTE VIEWPOINT

- Regulators must enforce all rules and regulation to prohibit and sanction all forms of market manipulation and fraud.
- Appropriately registered and regulated market makers should not 1) use information to trade ahead of, or "front run," orders of clients; 2) step ahead of available best bid or offer without providing meaningful price improvement; or 3) permit others, either within their firms or clients of their firms, to access order book without appropriate pre-trade risk controls.
- HFTs pursuing market making strategies should not have special access to the market order book unless they are subject to the same capital and transparency obligations of traditional market makers. Broker-dealers should not give HFTs unfiltered direct market access.
- Regulators should make it incumbent upon firms to strengthen testing and oversight of algorithms to improve network resiliency, especially for potential bouts of volatility.
- Exchanges should be permitted to offer co-location services only if it is provided on equal commercial terms to all market participants willing to purchase such proximity for a given level of service.

CAREER SERVICES

CFA Society Cleveland Investing In Your Career

CFA Society Cleveland hosted the **5th Investing in Your Career** at Cleveland State University on September 10, 2015. We had a great turnout with 70 students and 8 employers. The day started and ended with networking and an opportunity for students to talk to representative from the employers.

2015 Investing in Your Career Employers

Boyd Watterson Asset Management
 Cleveland Research Company
 Hartland
 Key Bank
 Longbow Research
 MAI Capital Management
 North Coast Research
 PNC

The day continued with valuable topics and speakers:

The CFA Charter and Program Explained

For students and non-CFA Charterholders interested in learning more about the CFA Program
 Session Presenter: **Craig Cimatori**, CFA, Managing Director, Institutional Equity Sales, KeyCorp

Craig will provide an overview of the CFA Program and will be joined by a panel of three CFA Charterholders who will candidly answer any question you have about the CFA Charter, CFA Program, or CFA Society Cleveland.

Building Your Network – Networking and Making Connections for Career Success

Session Presenter: **Dave Skoglund**, President/CEO, Multi-Dimensional Services, Inc.
 Dave stresses the importance of networking to get that first job out of school, while offering several examples of how to do so successfully at a corporate/professional event.

Job Search Strategy Uncensored (panel discussion)

It is your turn to ask the tough questions. Jen will ask our panel of investment professionals to discuss their interviewing experiences and insights as well as answer your questions about the recruiting process.

Moderator: **Jen Paglio**, Campus Recruiter, KeyCorp

Panelist #1: **Kara Kavanaugh**, Research Associate, Northcoast Research

Panelist #2: **Jeff Stark**, Senior Associate & Portfolio Manager, MAI Capital Management, LLC

Panelist #3: **Amit Shah**, SVP/Director Strategic Initiatives, PNC



**Thanks to all the employers and students who attended and Cleveland State University.
 We look forward to seeing everyone next year.**

CAREER SERVICES

Job Title: Associate Analyst
Employer: Longbow Research
Job Location: Seven Hills, Ohio
[Apply Here](#)

Associate Analyst

The successful candidate for Research Associate will play a key role in furthering the success of a research franchise through multiple avenues of contribution to client needs and the research investment narrative. A successful Associate will continue to develop client-focused proprietary market research; evaluate global trends; participate in conference calls, analyst conferences, and industry seminars; speak with senior management of companies under coverage; write/convey research insights; and create/maintain financial models. The ideal candidate will have an undergraduate degree from a recognized university with a concentration in finance. A background in investment research and progress toward a CFA designation are preferable, but not a necessity. The candidate must be highly driven to succeed, yet capable of contributing within a team environment to the success of his/her peers. A keen interest in the stock market is a prerequisite. Email contact only please.

APPLY HERE

https://workforcenow.adp.com/jobs/apply/posting.html?client=longsec&jobId=14899&lang=en_US&source=CC1

Job Title: Junior Equity Analyst
Employer: Longbow Research
Job Location: Seven Hills, Ohio
[Apply Here](#)

Junior Equity Analyst

The successful candidate for Junior Equity Analyst will play a key role in furthering the success of a research franchise through multiple avenues of contribution to client needs and the research investment narrative. Successful Junior Analysts can manage and develop market research; evaluate global trends; create/maintain financial models; write/convey investment opinions, research insights, and detailed industry and company analysis; manage the research marketing materials; converse with the senior management of companies under coverage; participate in conference calls, analyst conferences, and industry seminars; present investment opinions to Longbow's internal sales team; and develop client relationships. The ideal candidate will have an MBA from a recognized business school. A background in investment research and a CFA designation are preferable, but not a necessity. The candidate must be highly driven to succeed, yet capable of contributing within a team environment to the success of his/her peers. A keen interest in the stock market is a prerequisite. The Junior Analyst position is designed to prepare the individual for a Senior Analyst position with full coverage responsibilities in approximately three years. Compensation consists of (i) a base + bonus arrangement typical of the position and competitive with current Wall Street levels and (ii) a generous benefits package. Email contact only please.

APPLY HERE

https://workforcenow.adp.com/jobs/apply/posting.html?client=longsec&jobId=14828&lang=en_US&source=CC6