



## Marketing Analyst

The Marketing Analyst is a key member of the SGA marketing and client service team and works to ensure prospect and client needs are handled timely and accurately. The ideal candidate is an organized, client service-oriented individual with a positive attitude, solid writing skills and exceptional attention to detail. The candidate must have strong analytical skills, be willing to learn and have experience or interest in financial services. SGA's entrepreneurial environment provides candidates with the unique opportunity to interact with senior management on a daily basis and to take on a wide variety of responsibilities.

### Responsibilities include:

- Provide analysis using FactSet, Excel and other financial analytics tools and platforms.
- Populate reports in Excel and assist in updating marketing materials (PowerPoint & Word); working closely with Compliance for approval.
- Support senior Sales and Client Service professionals in responding quickly and professionally to ad-hoc client and prospect requests.
- Lead effort to post SGA data to multiple databases on a monthly and quarterly basis.
- Update client and consultant portals monthly and quarterly, continuously improving processes.
- Lead effort in responding to RFPs & DDQs using firm's proposal automation software.
- Lead effort in the production of sales and client service presentation books.
- Track client reporting requirements and accompanying distribution lists to ensure that deadlines are met and that documents are sent to the appropriate personnel.
- Prioritize tasks while working on multiple assignments; track, document and communicate status of tasks and provide timely follow-up to ensure completion.
- Work both independently and as part of a team with professionals at all levels.

### General Experience, Skills, and Qualifications:

Successful candidates should have some or all of the following experience and skills:

- Bachelor's Degree required
- Advanced skills in Excel, PowerPoint and Word
- Preference for working in a small-team environment
- Excellent interpersonal and communication skills required
- Exceptional organizational skills and attention to detail required
- Self-starter and problem solver
- Experience with FactSet, SQL, VBA a plus
- Currently pursuing CFA designation, or strong interest to complete

## Strategic Global Advisors, LLC

Strategic Global Advisors ("SGA") is an employee-owned Global Equity firm based in Newport Beach, California. SGA manages approximately \$5 billion in international, global and domestic equity strategies, primarily for institutional investors. The firm employs a systematic investment process based on sound fundamental research that integrates proprietary quantitative tools with fundamental analysis. SGA's proprietary stock selection model, risk model, and optimizer produce a focus list of securities for fundamental review as well as assist in portfolio construction.

SGA recruits and hires qualified candidates without regard to race, national origin, ancestry, religion (including religious dress and grooming practices), sex (including pregnancy, childbirth, breastfeeding, or related medical conditions), sexual orientation, gender (including gender identity and expression), age, military or veteran status, disability (physical or mental), any factor prohibited by law, and as such affirms in policy and practice to support and promote the concept of equal employment opportunity and affirmative action, in accordance with all applicable federal, state, provincial and municipal laws. The company also prohibits discrimination on other bases such as medical condition, or marital status under applicable laws.

SGA is an Equal Employment Opportunity/Affirmative Action employer. We provide reasonable accommodation for qualified individuals with disabilities, and disabled veterans, in job application procedures.

Interested candidates should forward their cover letter and resume to [careers@sgadvisors.com](mailto:careers@sgadvisors.com).