



Financial Analyst

About Andina Advisors

Andina Advisors is a financial planning and portfolio management firm based in Lehi, UT. Our team specializes in investment management, retirement planning, business planning, and tax planning. We serve business owners, high-level executives, working professionals, and retirees. We also offer family office services, including investment and balance sheet reporting, tax preparation, trust and estate management, philanthropic planning, and family governance and education.

Job Description

Andina Advisors is seeking a highly motivated individual to join our team as a full- or part-time Financial Analyst. As a Financial Analyst, your career path can branch into either a Financial Planning Analyst or Investment Analyst based on your preference and skill set. The ultimate goal is for the candidate to grow into a Wealth Advisory role or part of our investment operations team.

Duties:

- Assist with onboard new clients through our Andina financial planning process
- Assist with investment due diligence and portfolio management
- Build and maintain client financial plans
- Create annual client deliverables
- Assist in building client investment portfolio proposals
- Help manage and organize our CRM and portfolio management software
- Prepare for client meetings
- Support onboarding paperwork and documentation

Desired Qualifications: We are looking for a candidate who will raise the bar and show proof of extraordinary ability and results with the following skills:

- Strong communication skills, including verbal, written, and interpersonal.
- Proficiency with Microsoft 360
- Exceptional attention to detail
- Strong analytical and problem-solving abilities
- A proactive and self-motivated attitude with the ability to collaborate in a team environment
- Desire to obtain CFP® and a degree in Finance, Accounting, Economics, Business Administration, or a related field (or in progress)
- Commitment to at least one year

Compensation: Based on experience

To apply: Please send your resume to agraham@andinaadvisors.com along with a cover letter that highlights your experience, explains why you are a strong fit for the position, and shares what specifically interests you about Andina Advisors