

# Investment Analyst, Portfolio Accountant and Trader

Robinson Value Management, Ltd. – San Antonio, TX

**Job Description:** Robinson Value Management (“RVM”) is searching for a detail-oriented investment analyst to assist the portfolio manager in the firm’s investment research, client portfolio accounting, trade execution, and preparation of marketing materials.

The selected candidate will maintain internal research databases and programming, evaluate specific investment opportunities, update marketing materials, and support the client service team. In addition, the selected candidate will oversee and maintain client portfolio accounting. Responsibilities include opening, closing, maintaining and reconciling accounts. The candidate will become the company’s primary trader working closely with the portfolio manager to structure and execute trades. Position includes opportunity to advance to associate portfolio manager and eventually partner as part of a succession plan.

RVM is a small firm, so there will be numerous learning opportunities and many ways to contribute. There is an annual bonus component to compensation in addition to salary. New business generated will lead to faster growth of bonus, salary and partner opportunities. Assistance with CFA coursework and additional bonuses tied to successful completion of each level of the CFA exam/certification process will also be a part of this opportunity.

Robinson Value Management, Ltd. is an investment advisory firm registered with the Securities Exchange Commission that manages equity, fixed income, and balanced portfolios for individuals and institutions. Founded in 1997, we are located in San Antonio, Texas. We love our work and our clients. We are inspired by the notion that economics is not merely the study of ways to place assets to their highest and best use, but rather a noble endeavor, nothing less than the effort to save mankind from the servitude of deprivation. We serve our clients by seeking truth with integrity and long hours. We believe that iron sharpens iron, an ability to present one’s ideas and vigorously debate the merits and weaknesses of those ideas will be required.

**Qualifications:** Candidates need strong math and English abilities, solid work ethic, as well as a passionate interest in investing and accounting. Proficiency with Microsoft Office, particularly Excel, is important but can be learned on the job. Experience with VBA, Python, and PowerPoint is also a plus. Must be authorized to work in the US for any employer, ready to interview immediately, and ready to begin work soon.

Job Type: Full-time

Salary: Base + Bonus, depending on education, experience, and abilities

Minimum required education: Bachelor's Degree. Recommended or growth aspirations: MBA and/or CFA

For more information please email regarding your interest with resume to [charles@robinsonvalue.com](mailto:charles@robinsonvalue.com).