Rotational Analyst Fellowship | Full Time

ST. LOUIS TRUST
& Family Office

PROBLEM SOLVERS WANTED | Our motivated, talented team is the secret to our success. We are committed to fostering a highly collaborative environment and ongoing opportunities for learning at all levels.

WHO ARE WE | We are a multi-family office and trust company that serves multi-generational families with complex family affairs. Our philosophy is straightforward; focus on our clients, put them first and always better our service. We provide holistic, high-touch client service including customized, independent investment management and a full range of family office and fiduciary services. We serve a limited number of clients with substantial wealth in order to maintain very low client-to-employee ratios. Each client family is different, and so are we.

ST. LOUIS TRUST & FAMILY OFFICE is seeking candidates for our two-year Rotational Analyst Fellowship program. This is a great opportunity for new graduates to explore a financial services career with a growing, successful company. **ST. LOUIS TRUST & FAMILY OFFICE** works with approximately 60 client families across the country, advising on more than $15 billion of total wealth.

The Rotational Analyst Fellowship position is designed to incorporate hands-on work supporting the delivery of client service, advancing various internal projects and assisting with company-wide initiatives. Rotational Analysts will gain professional experience including exposure to various elements of the financial services industry and teamwork. They will learn desirable skills and have access to mentoring from seasoned colleagues with diverse backgrounds.

YOU SHOULD APPLY IF YOU...

- Are graduating in May or August 2023
- Plan to live in St. Louis, Missouri after graduation
- Want to continue learning by gaining varied work experience
- Enjoy working with people in a team construct to accomplish goals
- Are interested in exploring the financial industry
- Have an aptitude for and/or interest in business, finance/wealth management, relationship management, customer service and/or the stock market
- Like numbers
- Enjoy learning new skills through research, reading, instruction and hands-on effort
- Like puzzles or problem solving

DESIRED QUALIFICATIONS, BACKGROUND AND SKILLS:

- Bachelor's degree (anticipated Spring 2023) with preferred minimum GPA of 3.4
- Coursework that includes economics, statistics and/or calculus considered a plus
- Excellent analytical and critical thinking abilities
- Advanced Excel skills
- Experience with Microsoft Power BI and/or SharePoint considered a plus
- Detail-orientation, with organization and thoroughness to enable production of error-free output
- Initiative and proven project ownership skills
- Adaptable to changing responsibilities
- High energy level, strong work ethic, quick learner
- Strong verbal and written communication skills

RESPONSIBILITIES MAY INCLUDE:

Client Service Delivery

- Prepare financial projections/calculations and materials for client meetings including reports such as cash flow summaries, balance sheets, performance reports and other client specific reports
- Analyze investment performance and research investment options/recommendations as directed
- Coordinate, gather and organize tax and estate planning information
- Contact custodians, money managers, accountants, and external advisors/vendors on behalf of client teams
- Learn and run various specialized, financial software applications

Internal Projects

- Assist with projects which might include marketing, website/intranet management, database administration and general operations
- Perform full spectrum of tasks ranging from simple/repetitive to complex/challenging

Company-wide Initiatives

- Coordinate and attend select standing committee meetings
- Coordinate 1099 tax reporting
- Accumulate and summarize client cash flow information at regular intervals

EXCELLENT BENEFITS INCLUDE:

- Competitive compensation
- 401(k) with Company match
- Generous benefits package available including medical, dental and vision coverage, FSA/HSA and paid time off (PTO)
- Extensive in-house training
- Cell phone reimbursement
- Company-paid parking