

# Trader/Analyst

## Vista Capital Partners

Vista Capital Partners is one of the leading financial advisors in the Pacific Northwest and has become a career destination. Our unique investment philosophy, standard-setting client services, and engaging work environment help to attract and retain top talent. Our core purpose is to build happier and more prosperous lives.

We believe a healthy work/life balance is essential—happy employees provide the best possible service to our clients. To that end, we engage in regular team-building exercises, provide time for employees to volunteer in the community, and offer periodic sabbaticals.

Vista's continued growth has created an opportunity for us to add a new Trader/Analyst.

### Job Summary

The Trader/Analyst serves as a member of the firm's Investment Committee. The position will work closely with advisors and be responsible for managing investments in client accounts by helping to develop and execute trades. The Trader/Analyst will also work closely with Vista's Chief Investment Officer and Investment Committee to support the firm's research projects.

### Duties and Responsibilities

The Trader/Analyst can expect to focus their work in the following areas:

- Monitor asset allocation of client accounts and conduct rebalancing utilizing our portfolio management system (Tamarac).
- Work closely with Portfolio Managers and Lead Advisors to ensure client portfolios are invested according to Investment Policy.
- Work with compliance to document and report on trading activity and assist with other compliance related tasks.
- Maintain all asset codes, rebalancing codes, and model management within our portfolio management system (Tamarac).
- Produce periodic reports, including quarterly reports, from Tamarac to help support the firm's activities.
- Help maintain the firm's composite(s) of performance.
- Collaborate with Portfolio Managers and Lead Advisors to enter and analyze data in investment portfolio proposals as necessary.
- Provide support to Chief Investment Officer and Investment Committee with analysis and other investment related projects.
- Identify opportunities for process automation.

## Core Values

We will hire the person who best embodies and embraces Vista's core values:

- **Act with Integrity**  
Successful relationships are built on trust.
- **Strive for Simplicity**  
Keeping things simple allows us to focus on what truly matters.
- **Be Passionate**  
An unwavering belief in what we're doing brings out the best in us. Passion inspires and is contagious.
- **Demand Excellence**  
Our clients and colleagues deserve our best effort. Always.
- **Enjoy the Journey**  
A fun and flexible work environment allows our people to enjoy happy and fulfilling lives.

## Qualifications

The Trader/Analyst position typically requires the following qualifications:

- Ability to manage and prioritize multiple tasks in a time-sensitive environment and comfort with taking on significant responsibility.
- Minimum 3-5 years of experience in investment related field; portfolio management and/or trading experience highly preferred.
- Ability to organize and present data; strong Excel and/or programming skills a plus.
- Experience with Tamarac or other trade/order portfolio management software.
- Experience with Charles Schwab as custodian, preferred.
- Bachelor's Degree in Business, Finance, Economics, Accounting, Mathematics or related field. Series 65 License will be required.

## Salary and Benefits

Pay/benefits are competitive based on industry standards:

- Salary based on experience.
- Bonus.
- Profit sharing.
- Benefits include health care, paid time off, sabbaticals and 401(k).

- Partial and/or full financial support for professional accreditation/continuing education requirements and other education/training opportunities.

## How to Apply

Interested applicants should send their resumes with a cover letter to: Tana Thomson, [tana@vistacp.com](mailto:tana@vistacp.com). Mailing address is:

Vista Capital Partners  
9755 S.W. Barnes Road, Suite 595  
Portland, OR 97225

We will contact you if we believe your qualifications meet our needs. Thank you!

VISTA CAPITAL PARTNERS IS AN EQUAL OPPORTUNITY EMPLOYER