**Job Title:** Investment & Data Specialist

**General Description:**

This position is responsible for supporting USI Consulting Group in the Central and Southern Regions based out of Knoxville, Tennessee in an analytical and operational capacity. The position does require the ability to present in Spanish.

**Responsibilities as Investment and Data Specialist:**

* Present retirement education to plan participants in Spanish
* Provide analytical support to our investment advisory clients
* Download monthly statements and assist in report production
* Periodically review and maintain client records, including investment policy statements
* Review Defined Benefit client accounts monthly for contributions, cash positions, and rebalance, as needed, on a quarterly basis
* Produce analytical reports to review, monitor, and analyze performance for target date funds
* Provide analytical support in reviewing investment options, including performance and fees
* Maintain complete and accurate list of all clients, including, but not limited to, contact information for all Defined Benefit and Defined Contribution clients
* Provide sales support, including assisting in responding to requests for proposals (RFPs)
* Assist team members in special projects upon request

**Personal and Organizational Skills:**

* Attention to detail, ability to stay organized and focused in a busy environment.
* Ability to work well within a team environment.
* Effective communicator and strong interpersonal skills.

**Preferred Skills:**

* Finance Major
* Passed CFA Level I Exam
* Experience with investment related software

**Required Skills:**

* Bachelor’s degree or equivalent work experience in retirement or brokerage industry
* Fluent in Spanish
* Proficient in Excel, PowerPoint, and Word

**Position Type:** Full-time

Contact:

**Ralph Lehman, CFA, CAIA**

Investment Consultant

USI Consulting Group

900 South Gay Street, Suite 1796, Knoxville, TN 37902

C: 865-803-7086   W: 865-450-1916

[Ralph.Lehman@usi.com](mailto:Ralph.Lehman@usi.com) | [usi.com](http://www.usi.com/) | [usicg.com](http://www.usicg.com/)