

Investment Analyst

Schaper, Benz & Wise (SBW) Investment Counsel is seeking an Investment Analyst. Located in Neenah, Wisconsin, SBW has approximately \$1.4 billion of assets under management. We primarily manage equity and balanced portfolios for high-net-worth individuals and families, foundations, pension and profit-sharing plans, and corporations.

Ideal candidates would have the desire to be part of a small, close-knit team of dedicated investment professionals that strives to achieve a high level of client satisfaction and that values quality, internal research. Candidates should have a strong background in finance and accounting and excellent verbal and written communication skills. A successful candidate will be proficient in Microsoft Excel and possess working knowledge of financial statement analysis (income statement, balance sheet, and cash flow statement). A BBA is required, and having the CFA designation, or the interest in pursuing the CFA designation, is preferred.

We conduct fundamental equity research, and the candidate would be instrumental in writing quarterly reports on existing stocks under coverage, finding prospective new ideas for client portfolios, and updating earnings and valuation models. Our investment philosophy emphasizes long-term ownership of established, high-quality, consistent growth companies, as well as the discovery of smaller, emerging growth stocks and turnaround/special situations. We are generalists with limited market capitalization restrictions.

The firm offers a professional and competitive, yet flexible, work environment. The position requires a physical presence in Neenah, Wisconsin. Schaper, Benz & Wise Investment Counsel, Inc. is an independent firm 100% owned by its employees.

Interested candidates should send their cover letter and resume to the contact email below:

Email: sbw@sbw-invest.com