

## Stonebridge Capital Advisors, LLC

**Title:** Data Analytics Associate

**Reports To:** Director of Analytics

**Status:** Full Time

Stonebridge Capital Advisors is a dynamic and nationally recognized Twin Cities based Investment and Wealth Management Company celebrating over 25 years serving our clients. We serve our clients as a fiduciary; meaning our clients' best interests always come first. As a diverse team of professionals, we work together in achieving our clients' goals. We value the dedication, integrity, and commitment each Stonebridge team member plays in our firm's success.

### Overview

Play a part in helping build out Stonebridge's new Data Analytics Team! The Data Analytics Team works closely with the portfolio management team on developing and maintaining the systems and processes that enable portfolio management team to operate successfully. In addition, the team will collaborate with the entire firm to enhance operational efficiency.

This position is responsible for providing portfolio analytics support to investment managers and data management support to the overall firm. Portfolio Analytics responsibilities include tracking client investment portfolios, identifying outlier portfolios, working with portfolio managers to re-align portfolios according to their strategies. Data Management responsibilities include managing, cleaning, and updating firm data sets, managing dataflows between systems, and learning to program data solutions independently.

### Summary of Job Responsibilities

- Develop, organize, and maintain data models to support business insights, processes, and strategic decision-making across the firm.
- Create code and reports to increase efficiency across firm processes.
- Manage internal proprietary system and build new functionality using VBA, SQL, Microsoft Excel, Azure Data Factory Pipelines.
- Create and implement data management processes.
- Assist in testing new system releases.
- Create reports to identify outliers amongst portfolios. Collaborate with portfolio management team in understanding the source of the outliers. Execute solutions to re-align outlier portfolios including adjusting data inputs.
- Manage periodic (daily, weekly, etc.) data flows between Stonebridge's internal portfolio management and third-party platforms, as well as run periodic firm data processes.
- Perform other related duties and special projects as assigned.

### **Qualifications**

- 3+ years of experience required.
- Bachelor's degree or relevant experience in: Computer Science, Mathematics, Data Analytics, or related subject matter.
- Advanced experience with Excel required.
- Must have a strong attention to detail.
- Solid understanding of data management, with a desire to learn more.
- Basic programming skills: VBA, SQL, Azure Cloud Services, C#/Ruby/Python or similar languages, with a desire to learn independently and the expectation to become a strong programmer.
- Interest in Finance or Investment Management.

### **Salary & Benefits**

Stonebridge Capital offers a competitive salary based on experience and comprehensive benefit plan that includes; medical, dental and life insurance, 401-(k), health savings plan, vision, and paid company holidays.

### **Contact**

To apply, please submit your resume and cover letter to [LWessel@stonebridgecap.com](mailto:LWessel@stonebridgecap.com)