

Job Title: Investment Analyst

Job Type: Full-time

Experience: At least 3 years of experience, preferably in M&A, PE or in a family office setting

Location: Geneva (on-site)

Salary: Competitive, commensurate with experience and qualifications

Company Description

We are a single family of a Tier 1 Swiss banker. The company invests solely in alternative investments, mostly private equity either directly or through private equity funds, as well as real estate.

Our family office is generalist by nature, but the current private equity investment strategy revolves around companies at various development stages (from seed to large established institutions) in five different preferred industries: finance, tech & digital, beauty & wellness, life science, and lifestyle.

Job Description:

We are seeking a highly motivated Investment Analyst with at least 3 years of experience to join our team. The Financial Analyst will be responsible for supporting the Investment Director, reviewing investment opportunities, analyzing financial data, preparing financial and investment reports, and providing recommendations to the investment team to improve financial performance for the family's investment portfolio.

Responsibilities:

- Conduct financial analysis and forecasting, including preparing financial reports, identifying trends, and developing financial models to assist in decision-making for the family's investment portfolio.
- Monitor financial performance of the family's investment portfolio and prepare reports for the investment team and family members.
- Provide financial insights and recommendations to the investment team and family members to support strategic planning and decision-making.
- Support due diligence on investment opportunities and provide recommendations to the investment team.
- Research and analyze market trends and developments to stay up to date on investment opportunities and risks.
- Collaborate with the investment team to identify opportunities to improve financial performance of the family's investment portfolio and make recommendations for action.
- Support the preparation of the annual budget and long-term financial plans for the family's investment portfolio.
- Prepare and present investment reports to the family on a regular basis, including performance updates, portfolio reviews, and recommendations for future investments.
- Maintain financial databases and systems to ensure accurate and timely data.
- Perform ad-hoc financial analysis as required.

Requirements:

- Bachelor's degree in finance, accounting, or a related field.
- 3 to 5 years of experience in financial analysis, with a demonstrated ability to analyze financial data and develop financial models, preferably in M&A or Private Equity or in a Family Office.
- Strong analytical skills and attention to detail.
- Excellent communication and interpersonal skills, with the ability to collaborate effectively with cross-functional teams.

- Proficient in Microsoft Excel, PowerPoint, and other financial analysis tools.
- Strong understanding of financial statements and accounting principles.
- Demonstrated ability to conduct thorough due diligence on investment opportunities and provide recommendations based on sound analysis.
- Ability to work independently and manage multiple projects simultaneously.
- Fluency in English and Italian is required, another European language would be a plus (German or French)
- CPA, CFA, or MBA preferred but not required.

If you meet the qualifications listed above and are looking for an exciting opportunity to work as a Investment Analyst with a dynamic team, we encourage you to apply today.