

# Senior Fixed Income Analyst

## JOB DESCRIPTION

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### SUMMARY

Howe & Rusling is a Registered Investment Advisory and wealth management firm based in Rochester, NY with 94 years of experience and over \$1.7 billion in assets under management. While we ground ourselves in our long, rich history, the firm that exists today is one that continues to embrace the ever-evolving world around us. Our firm is owned and operated by its employees and is a proud veteran-owned and woman-owned business. Howe & Rusling strives to create and nurture a work environment that attracts the best talent and reflects our commitment to our clients, teammates, and community. And we're proud that as we've grown, our culture has remained centered around collaboration, camaraderie, and collective hard work for our clients and community.

### POSITION DESCRIPTION

The Fixed Income Analyst will support the Director of Fixed Income in implementing Howe & Rusling's fixed income strategies. This role includes critical aspects of fixed income asset management, security selection, and trading while maintaining performance-driven results aligned with individual client account guidelines. The analyst will also assist with macroeconomic and credit analysis, trade idea generation, and support diversified portfolio construction. Key responsibilities also include assisting in bond purchase settlements and resolving any settlement issues, while providing ongoing market insights to the fixed income team and firm portfolio managers.

### RESPONSIBILITIES

- Fixed Income Expertise: Serve as a subject matter expert on fixed income products, pricing, and product development.
- Trading Support: Actively participate in fixed income trading activities, ensuring best execution and compliance with client account guidelines.
- Credit Research: Conduct research on investment-grade taxable and tax-exempt securities.
- Portfolio Support: Collaborate with firm colleagues to meet service level expectations and enhance client service.
- Client Engagement: Participate in new business presentations and client reviews as needed.
- Market Analysis: Provide insights on market developments relevant to fixed income strategy and portfolio management.

### SKILLS AND REQUIREMENTS

- Team Collaboration: Strong work ethic and a team-player mentality.
- Independent Work: Ability to operate effectively under minimal supervision.
- Communication: Exceptional written and verbal communication skills.
- Fixed Income Markets Experience: Relevant experience in fixed income markets, with strong relationships across market coverage.
- Analytical Ability: Proficiency in analyzing bids, offerings, and trade ideas for value.
- Execution and Compliance: Adherence to best execution practices, compliance protocols, and thorough procedures to ensure client benefit.
- Technical Skills: Proficiency in Bloomberg or other portfolio management tools; advanced skills in Excel, Word, and PowerPoint.

### EDUCATION AND QUALIFICATIONS

- Experience: Minimum of 3-5 years in fixed income asset management; experience with separately managed accounts is a plus.
- Trading Background: Background in trading, particularly in investment-grade taxable & tax-exempt markets, is highly desirable.
- Degree: Bachelor's degree in finance, economics, or a related field; CFA or progress toward designation preferred.



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