



QUANTITATIVE STRATEGIST 2026

Merrillville, IN. Conduct quantitative analysis of holdings, strategies, & investment philosophy across the firm. Hold one-on-one meetings with advisor groups & Portfolio Management team members to review portfolio performance, strategy alignment, & provide additive recommendations. Translate complex quantitative findings into clear actions tailored to advisors' needs & client goals. Identify & escalate concerns to Sr Director of Portfolio Management to drive continuous improvement. Train & mentor new Portfolio Management team members on firm's investment approach & internal tools. Deliver timely, accurate updates on Waverly's investment strategies to internal stakeholders, supporting advisor meetings & client-facing communications. Act as primary point of contact for members of Portfolio Management team seeking clarity on firmwide investment approaches. Collaborate with internal investment, research, & planning teams to ensure consistent & coordinated messaging. Facilitate the adoption of firmwide investment options by connecting advisors with internal resources. Create internal quantitative analysis reports to support advisor growth & business development. Represent the Portfolio Management team on internal committees & cross-functional projects as needed.

Reqs: Master's in finance, economics or related field plus 2 years' experience conducting economic analysis using financial analysis software such as Morningstar, Factset & Statista; managing client portfolios, & formulating plans for taxation, retirement & estate planning based on client information. Partial remote work permitted in Greater Chicago MSA. Background checks (criminal, education, employment verification) required. Salary: \$93,933 to \$105,705.60. Benefits: Health, dental, & vision insurance, 401k, Flex PTO, 12 holidays, 1 day during birthday week, & 4 weeks sabbatical after 7 yrs of svc.

Resumes: Jamie Smith, Waverly Employment Services, LLC, 600 University Park Pl., Ste. 501, Birmingham, AL 35209 or email to hr@waverly-advisors.com.