

**Private Investment Analyst
Position Description**

Cobblestone Capital Advisors is an established, growing wealth management firm registered with the SEC and based in Rochester, NY. Cobblestone provides clients with investment solutions designed to help them meet their financial goals. These investment solutions often consist of globally diversified portfolios that can include both public market investments and private market opportunities. Within private capital markets, Cobblestone provides clients access to proprietary solutions (Cobblestone-managed Private Funds) and third-party options.

Cobblestone has spent over a decade developing its Private Investment Platform to connect prospects and clients with attractive private market opportunities on institutional terms. With the foundation laid, we are ready to advance several growth initiatives and are looking for the right person to add to the analytical team to support that vision.

As an Investment Analyst within Cobblestone's Private Investment Platform, you will focus exclusively on private market investments. From sourcing new opportunities to conducting research and performing due diligence, your efforts will help grow the platform by connecting quality investment opportunities in private equity, private real estate, and private credit to existing and prospective Cobblestone clients. In addition to research and analysis, you will assist with portfolio management activities and communicate internally to staff and externally to investors regarding position- and Fund-level performance. The Private Investment Analyst will report to the Director of Private Investments.

Responsibilities for this position include:

- Investment Research and Analysis
 - Performing due diligence on private equity, private real estate, and private credit investment opportunities (including direct investments, diversified portfolios, and blind-pool Funds) and providing investment recommendations to the lead Manager and members of the Investment Committee.
 - Conducting organizational and operational due diligence on third-party sponsors.
 - Providing analytical support in the construction of closed-end private Funds.
- Portfolio Management and Monitoring
 - Monitoring and analyzing existing investments to assist with portfolio construction and management decisions.
- Reporting
 - Generating internal and external reporting on alternative investments to provide periodic updates to clients and internal users of the information.

Qualifications:

- Candidates must possess a well-rounded educational and professional background, an innate curiosity regarding broad economic, business, and other topics, an ability to think critically, very strong analytical skills, and a demonstrated passion for investing.
- A self-starter with the capacity to work independently; must also be able to work as part of a close team and take direction from senior colleagues.
- Strong communication skills.
- Proficiency with Microsoft Office software programs, specifically Microsoft Excel.
- 3-7+ years of investment-related experience.
- Bachelor's degree required with preferred concentration in accounting, finance, economics, business, or other quantitative fields.

- Experience with financial statement analysis is required.
- Attainment of, progress toward, or commitment to obtaining the Chartered Financial Analyst (CFA) designation (or similar professional designation) is required.

Compensation: \$60,000 - \$100,000 base salary expected.

Interested candidates must apply here:

https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=3412d63d-3eba-4d9f-93f9-621ab0a2ca92&cclid=19000101_000001&jobId=479273&source=CC2&lang=en_US

No phone calls, please.

We are an Equal Opportunity Employer and our company's policies and practices relating to recruitment, employment, career development and advancement, promotion and retirement are based solely on merit, without regard to all legally protected classes, including but not limited to: race, color, sex, age, disability, religion, citizenship or immigration status, national origin, ancestry, military status or veteran status, marital status, familial status, sexual orientation, domestic violence victim status, predisposing genetic characteristics and genetic information, and any other status protected by law.