

Title

Product Reporting Associate

Location

Madison, WI

Classification

Full-Time

Background

Founded in 1974, the Madison Investments organization has grown into a nationally recognized asset management firm that manages client assets across a suite of mutual funds, managed accounts, and customized portfolios. The catalyst for the Firm's growth has been a management style that looks beyond short-term trends, emphasizing the performance of investments over full market cycles. Our highly credentialed investment professionals share a belief in high-conviction, risk-conscious investing, and have the autonomy to shape this approach within their own investment teams. For more information on the Madison Investments organization, please visit www.madisoninvestments.com

Position Description

Madison Investments is seeking a versatile and enthusiastic individual to serve as a Product Reporting Associate within its Business Development Team. The ideal candidate will possess a general knowledge and interest in the financial markets, while displaying the ability to learn and advance in a fast-paced, goal- and deadline-oriented environment. This position serves as the steward for product data, third party investment databases, reporting, and various technologies. It also serves as a strategic partner to business development, marketing, and investment management teams as we position our products and grow the Madison brand.

Duties

- Produce and maintain high quality, accurate, and timely reporting of the Firm's investment strategies.
- Update third-party investment databases with characteristics and statistics of the Firm's investment strategies. (E.g., eVestment, Morningstar, Informa/PSN, etc.)
- Update various reports used across the Firm, including FactSet attribution/characteristics, Morningstar Direct performance reports, marketing collateral, etc.
- Work closely with other members of the Firm's business development and marketing team to complete all necessary client requests.
- Partner with the Firm's investment management teams to understand the various investment products and vehicles, investment approaches, and differentiators. Serve as a subject matter expert for product data and data technologies.
- Develop product-level content, such as performance commentary and competitive analysis.
- Assist in the completion of client due diligence requests and new business RFPs, which may include providing both statistical and written information for the Firm and its investment strategies.

Required Qualifications:

- Bachelor's Degree in Finance, Economics or Business-related a plus
- Well-versed in Microsoft Excel, with knowledge of the full Microsoft Office Suite
- Ability to manage multiple priorities while collaborating with others in an extremely deadline driven business
- Excellent verbal and written communication skills
- Familiarity with Morningstar Direct and FactSet a plus

Benefits

- Comprehensive Benefits and Perks: health insurance, profit sharing, and 401(k) match
- Company Culture: collaborative, team-oriented, fast-paced, challenging and innovative
- Professional Development: training, cross-functional project opportunities

Position Demands:

- Extended hours may be required during peak workloads or special projects
- This position works in an office setting

RESUMES CAN BE SENT ELECTRONICALLY TO Jobs.Marketing@Madisonadv.com