



Job Description Senior Portfolio Analyst (Garden City, NY)

The Company:

BNY Mellon (www.bnymellon.com) is a global investments company dedicated to helping its clients manage and service their financial assets throughout the investment lifecycle. Whether providing financial services for institutions, corporations or individual investors, BNY Mellon delivers informed investment management and investment services in 35 countries and more than 100 markets.

As of June 30, 2016, BNY Mellon had \$29.5 trillion in assets under custody and/or administration, and \$1.7 trillion in assets under management. BNY Mellon can act as a single point of contact for clients looking to create, trade, hold, manage, service, distribute or restructure investments. BNY Mellon is the corporate brand of The Bank of New York Mellon Corporation (NYSE: BK). Additional information is available on www.bnymellon.com. Follow us on Twitter @BNYMellon or visit our newsroom at www.bnymellon.com/newsroom for the latest company news.

The Division:

BNY Mellon Wealth Management is a leading wealth manager, and was named in 2016 by Family Wealth Report as the top U.S. Private Bank. Barron's ranked it the 7th largest U.S. wealth manager in 2015. The firm has more than two centuries of experience in providing services to clients who today include financially successful individuals and families, their family offices and business enterprises, planned giving programs, and endowments and foundations. It has \$196.9 billion in total private client assets, as of June, 30, 2016, and an extensive network of offices in the U.S. and internationally. BNY Mellon Wealth Management, which provides investment management, custody, wealth and estate planning and private banking services, conducts business through various operating subsidiaries of The Bank of New York Mellon Corporation. For more information go to bnymellonwealthmanagement.com or follow us on Twitter @BNYMellonWealth.

The Role:

The Senior Portfolio Analyst provides Wealth Managers with a high level of support covering all aspects of their client relationships, including day-to-day administration and management of client portfolios. Senior Portfolio Analysts work closely with our internal partners in Fiduciary, Private Banking, business development, middle office and operations to meet our clients' wealth management needs. Daily responsibilities include, but are not limited to, preparing client presentation materials, monitoring cash balances, facilitating money transfers and opening new accounts. Senior Portfolio Analysts interact directly with our clients to address questions and resolve any outstanding issues. Additionally, Senior Portfolio Analysts assist Wealth Managers with developing investment strategies, policy statements and implementing portfolios for clients. The Senior Portfolio Analyst must possess the ability to work independently and efficiently and apply a working knowledge of company policies and procedures at all times.



BNY MELLON
WEALTH MANAGEMENT

Basic Qualifications:

- An undergraduate degree or equivalent work experience with 1 - 3 years of investment industry experience.

Preferred Qualifications:

- An undergraduate degree and 3+ years of work experience
- Strong analytical and problem solving skills
- Experience working in a highly detail oriented environment
- Strong proficiency with Microsoft Office
- Proven verbal and written communication skills
- Knowledge of investments/securities and a basic understanding of the financial markets
- CTFA