

Asset International is a B2B global information and technology company in the finance vertical; it features a diverse set of new revenue streams: electronic data, tools, online media, research, and events. For more than 20 years, Strategic Insight (SI), an Asset International company, has anchored competitive research and business intelligence at the heart of the mutual fund industry, now nearly \$30 trillion worldwide. Our core mission remains strengthening the mutual fund industry overall, and helping each of our clients succeed in the global marketplace.

## **SEC Documents Research Associate, Variable Annuities**

We are willing to train an experienced Research Associate to analyze and research SEC documents and variable annuity contracts. You research feature data from prospectuses, writing summaries to describe changes, and updating the *Policy II Data Entry System*. The associate is also responsible for updating the Contract Alert section of our web-based research product, [www.annuityinsight.com](http://www.annuityinsight.com) and sending out a daily e-mail alert on the research. Candidate should be smart, self-motivated, detailed minded, and able to work independently. Writing and analytical skills are critical. Knowledge of variable annuity contract features and prospectuses is desirable but we will train someone that has a background in financial services. Training is provided on variable annuities, how to read SEC prospectuses and the proprietary data management systems. Strong attention to detail and highly reliable work ethic are a must.

### **RESPONSIBILITIES**

- Research variable annuity contract prospectuses daily
- Enter and update contract feature data from prospectuses into the *Policy II Data Entry System*
- Update the Contract Alert and Fund Alert on Annuity Insight's home page daily
- Send out daily Contract Alert emails summarizing the days variable annuity contract filings
- Monitoring of new variable annuity filings including (485, 497, and N-4) from the SEC throughout the day
- Read , interpret and summarize contract features
- Train clients on how to use Annuity Insight
- Manage client relationships; maintain client records, user lists, and usage patterns
- Update DCA Rates monthly
- Approve user access to the website for current and new clients
- Assist on various ad hoc projects
- Contribute to SI research and publications. Assist senior and mid-level management in preparing data and presentations

### **REQUIREMENTS**

- Strong writing, research and analytical skills
- Attention to detail and highly reliable work ethic a must
- Associates or Bachelors degree

**Interested applicants should email a cover letter, resume and salary requirements/history to: [jobs@assetinternational.com](mailto:jobs@assetinternational.com)**

Asset International Inc. is an equal opportunity employer committed to workplace diversity

This job description in no way states or implies that these are the only duties to be performed by the employee(s) incumbent in this position. Employee(s) will be required to follow any other job related instructions and to perform any other job-related duties requested by any person authorized to give instructions or assignments