

Equity Generalist

Job Summary

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Under general supervision, uses specialized knowledge and skills obtained through experience and/or formal training to market Raymond James' in-house equity research products to Financial Advisors (FAs) and retail sales force. Fields questions about specific stocks, industries and analyzes general market trends. Detailed instructions and established procedures and prescribed guidelines are provided to perform a variety of tasks requiring minimal evaluation, originality or ingenuity in making routine decisions.

Essential Duties and Responsibilities

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- Coordinates individual efforts with team-members to ensure a consistently high level of service.
- Responds to questions about specific stocks, industries, market trends (90% of all requests are by phone).
- Discusses and explains industry trends with Financial Advisors to identify suitable investment opportunities.
- Prepares and publishes written/oral marketing pieces such as Stock Call of the Week and the SelectLISTS.
- Gathers financial and other data from various resources to respond to FA requests.
- Performs other duties and responsibilities as assigned.

Knowledge, Skills, and Abilities

Knowledge of

- Fundamental concepts, practices and procedures of research.
- Fundamental investment concepts, practices and procedures used in the securities industry.
- Financial markets and products.

Skill in

- Communicate effectively, both orally and in writing.
- Analytical skills sufficient to assess and explain events in the market.
- Problem solving skills and the ability to think independently sufficient to market ideas and assist FA's.
- Operating standard office equipments and using required software applications, including Microsoft Office and established databases.

Ability to

- Gather information, identify linkages and trends and apply findings to reports.
- Attend to detail while maintaining a big picture orientation.
- Remain cognizant of our commitment to daily workflow and regulatory compliance during high volume activity.
- Organize, manage and track multiple detailed tasks and assignments with frequently changing priorities in a fast-paced work environment.
- Establish and maintain effective working relationships at all levels of the organization.
- Work independently as well as collaboratively within a team environment.

Educational/Previous Experience Requirements**Education/Previous Experience**

- Bachelor's Degree (B.A.) in Finance or related field and a minimum of one (1) to three (3) years of related experience and/or training.
- OR ~
- Any equivalent combination of experience, education, and/or training approved by Human Resources.

Licenses/Certifications**Licenses/Certifications**

- SIE required provided that an exemption or grandfathering cannot be applied.
- Series 7 license or ability to obtain within six (6) months.

Travel**Travel Required**

Travel Required: Yes, 5 % of the Time

