

Alpha FMC – Asset & Wealth Management - North America Graduate Analyst Program

- Title: Analyst
- Start date: 18th August 2025
- Locations available in US: New York City, Boston, Denver, San Francisco
- We have a limited spaces therefore we recommend applying as early as possible

Introduction to Alpha Financial Markets Consulting

Alpha is the leading global consultancy to the asset and wealth management industry. We are a boutique management consulting firm that offers the world's top asset and wealth managers a competitive edge through our unrivaled expertise and industry insight. Our firm was founded in 2003 at its London headquarters, and has grown to over 1050+ consultants globally, including an expeditiously growing team in North America. Alpha has worked with all of the world's top 20 and 80% of the world's top 100 asset managers by AUM, and we work with over 950+ clients globally. Alpha has offices in the US, Canada, Europe, and APAC. In North America, we have a presence in New York, Toronto, Boston, Denver, and San Francisco.

Our business supports clients through 3 practice areas: Client & Digital, Investments & Operations. These are supported by several specialisms including Data, ESG, M&A, Benchmarking, and Regulatory & Compliance. Successful career paths at Alpha allow you to work as a generalist who supports clients across these practices; or specialize and support clients within a specific practice area.

At Alpha, diversity, equity, and inclusion is critical to our success, and we are committed to employing individuals from all backgrounds to reflect the multi-faceted society we live in. We have worked hard to foster an environment that welcomes everyone and celebrates each other's successes. We aspire for Alpha to not only feel like 'a job' – but a close-knit community and the place where you want to build a career.

Our people are at the heart of everything Alpha accomplishes, and we pride ourselves on working hard, delivering at the highest caliber, and achieving our objectives through collaboration. Among the benefits our vibrant firm offers, our focus on providing a supportive and social environment to employees lies at the core of our values. This includes firm-sponsored summer trips, comprehensive training and development programs, holiday parties, mentor / mentee events, peer-group activities, and regular socials at top local spots. Our community-oriented culture reflects fundamental values of Diversity, Equity & Inclusion as well as preminent Corporate Social Responsibility.

What makes us different?

- **Established yet entrepreneurial** – We believe that Alpha is the perfect combination of a successfully established firm (founded in 2003) whilst being entrepreneurial, dynamic, and growing. This means, your contributions are not only impactful and valued, but you also have the support of a top-tier organization with rapid growth and progression opportunities
- **Work alongside the best in the industry** – Working at Alpha gives you the opportunity to work alongside both the leading organizations in our industry, and also experts within the Alpha team. Learning directly from both will allow you to accelerate the development of your own expertise in the asset and wealth management space
- **We invest in developing your talent** – We run tailored training for all levels and support our talent with industry-leading qualifications including CFA, PMP, CAIA, and more. To support ongoing learning and development, we also offer up to 5 days of paid training time per year
- **A true meritocracy** – At Alpha, we don't have any concept of 'time at level' or promotion quotas – which means that your potential is truly driven by your performance, and you are in charge of your own career trajectory
- **High responsibility and autonomy** – Each member has a high level of responsibility and autonomy on every project, as well as exposure to senior team members (e.g. Partners) who continuously support, train and develop you
- **You share in our success** – We have a profit share scheme enabling everyone to share the firm's success
- **Culture and community** – We pride ourselves on creating a supportive, nurturing environment where people can be themselves

About the AWM Analyst Program

Our Asset and Wealth Management (AWM) Analyst Program offers competitive benefits and an unparalleled platform to enable rapid career development. The program will give you the opportunity to gain immediate hands-on consulting experience and skills through direct exposure to senior management teams within some of the world's largest asset managers.

New Analysts are provided with a developmental three-week 'AWM Analyst Training Program' designed to provide you with key consulting skills as well as a solid network within your cohort. The first week of the Training Program will consist of the following: tool-specific training (e.g. Excel charting/PowerPoint design); soft skill training (e.g. time management, leadership, presentation skills); and 'Management Consulting 101' (including project management skills and effective stakeholder management). You will have the opportunity to meet and learn directly from a range of Alpha Subject Matter Experts who will present client projects and explain the different focus areas within Alpha. The last two weeks of your training program will include preparation and

support for the CFA Investment Foundations® Certificate exam, which provides a high-level overview of the asset management industry.

Following the Analyst Training Program, you will likely be working on a client engagement. As for where you will work, our team do a combination of working from home, your local Alpha office, and client site. If your client is based in the same city, the amount of office time will vary depending on the client expectations (some clients don't ask us to be in their offices at all, others up to 4 days per week). If your client is based in a different city, travel to the client would typically only be required for key meetings or project milestones.

What are the role responsibilities?

You will work in teams to identify and implement solutions for a range of issues facing asset and wealth managers. Over the course of each project, you will collect and analyze data, prepare and test hypotheses, and present recommendations to the client to solve their unique business challenges.

As an AWM Analyst you will be responsible for:

- Following the project delivery plan and producing accurate, complete, and timely deliverables to support a successful client engagement.
- Supporting the creation of client deliverables by assisting in the facilitation of client meetings and workshops, maintaining project plans, performing analysis in Excel, and providing effective content creation (e.g., PowerPoint)
- Developing meaningful and successful relationships with clients and vendors by acting as a helpful and respectful first point of contact for stakeholders
- Supporting AWM's growth by assisting in the development of client proposals, whitepapers, and other market research
- Contributing to the wider Alpha community by participating in one or more of AWM's business management or practice areas
- Maintaining a high-level understanding of the challenges facing the Asset & Wealth Management Industry and understanding the basics of your specific project practice area

What's the compensation / benefits package?

As part of the Alpha team, you will be rewarded with the following:

- One-time signing bonus of \$5,000 USD
- A competitive salary of \$90,000 USD, with annual profit-sharing opportunity
- 25 days of annual paid time off
- Sponsorship towards professional certifications / training supported with 5 days of paid training time

- Reimbursement for commuting, mobile phone, and home internet expenses
- Supplemented medical, dental and vision coverage
- 401k matching
- Monthly team bonding socials with local office
- Learning & development: Vast opportunities for development, unlimited access to LinkedIn Learning
- Community events: We offer a range of social events and meetups
- Wellness initiatives to promote healthy working, including a gym reimbursement for those enrolled in our medical plans and an allowance for remote working technology
- Access to discounted travel, tickets, events, and more through our benefit partner

Who are we looking for?

We are looking for highly driven students who:

- Can start full-time on August 18th 2025 *(please note we are primarily looking for individuals to start on this date but will consider individuals starting earlier on an exceptional basis)*
- Have a minimum GPA of 3.3 or above
- Have a genuine interest in asset and wealth management
- Are curious, ambitious, creative, and entrepreneurial with a 'can do' attitude
- Have strong problem-solving skills with an analytical mindset
- Can effectively communicate in English (both written and spoken)
- Can be based in one of the following locations: New York City, Boston, Denver, San Francisco
- Are comfortable with the office / travel expectations in the Job Description
- Have graduated / are graduating with a Bachelor's degree in 2023, 2024 or 2025
- Have completed / are completing an undergraduate degree that has a focus on one of these areas: Business, Finance, Accounting, Economics, Maths, Physics, Chemistry
- Have the legal right to work in the US

Please note this is not suitable for Master's students, who should apply for experienced hire roles.

What's the recruitment process?

- **Apply today** by uploading your resume and transcript (unofficial or official)
- Eligible candidates will be invited to a **video interview stage**, where you will answer questions about your motivation for applying to the role and company (30 minutes)
- Successful candidates will be invited to a **live Teams interview** with a member of the team. Those who pass will then be invited to a **Super Day** – a 3-hour online event that consists of a welcome call, 2

interviews where you will have the opportunity to meet the team, and finally a wrap up session where you can ask any questions you may have!

- The final step will be a 30-minute **Final Round interview** with one of our leadership team – a great opportunity for you to ask any questions you might have.

Successful candidates will progress through the stages and our team will inform you of our decisions as quickly as possible between rounds.

Please note that applications are screened on a first come, first served basis and we recommend applying as early as possible.

Thank you very much for your interest in Alpha's AWM Analyst Program, and we look forward to receiving your application!

Equal Employment Opportunity

Alpha is an equal opportunities employer and the Group's policy is to ensure that all employees, or those seeking employment, are treated fairly. All decisions relating to recruitment, selection and promotion are made objectively regardless of race, ethnicity, nationality, gender, sexual orientation, religious belief, political opinion, age, or disability.

Data Management

Please be aware that we may hold information for up to 3 years from the close of the recruitment process to allow us to review your suitability for current and future job opportunities with Alpha, your data may also be shared with relevant third party providers as and when required as part of the assessment process. Full details around what data we hold, why we hold it and for how long are available in our recruitment privacy statement (<https://alphafmc.com/privacy-policy/>). If you have any questions, or would like us to delete your data, please contact us by email at privacy@alphafmc.com.