



# TRADING SPECIALIST

## ROLE DESCRIPTION

**Role Title** Trading Specialist  
**Reports To** Head Trader and LVZ Partners

**LVZ seeks a detail-oriented and analytical professional with strong communication skills to execute investment trades based on LVZ's investment strategy. This role is an excellent opportunity to build a foundational base for advancement within our team.**

### WHAT YOU'LL DO

- Review, analyze, model and generate valuation data and market reports; evaluate and summarize portfolio company, industry, sponsor, and valuation metrics on investment opportunities
- Participate in weekly LVZ Investment Committee Meetings
- Execute block trading strategies in accordance with the LVZ Investment Committee's objectives
- Monitor and reconcile trading positions consistently
- Communicate with LVZ clients, trade exchanges, and internal team members
- Utilize internal trade ticket system to complete trades and conduct record keeping
- Comply with legal and regulatory requirements and LVZ policies and procedures
- Report metrics and collaborate with marketing to produce communication materials

### WHO WE WANT ON OUR TEAM

- Effective communicator, both written and oral
- Attentive to the smallest details; willing to identify errors and take steps to rectify
- Demonstrated organizational skills; self-motivated; able to prioritize and meet deadlines
- Proficiency in Microsoft programs, CRM systems, and ability to quickly learn trading software
- Welcoming persona that is respectful for a diverse spectrum of clients and colleagues
- Desire to create and innovate processes

**LVZ operates on five non-negotiables that define the culture of our team. You are the right culture fit if you...**

- Foster a welcoming and respectful environment for team members and clients.
- Create extraordinary client experiences that exceed expectations.
- Operate on a foundation of integrity and clear communication.
- Pioneer new ideas and processes as a result of perpetual learning.
- Give generously of time, talents, and treasure to serve our communities.

## ABOUT LVZ

Since our founding in 1960, LVZ has remained constant in our mission to deliver peace of mind for whatever comes next in every subset of our firm. We started as a small firm that sold mutual funds - since then, we have expanded to managing multi-million-dollar portfolios and offering comprehensive financial planning services. Our firm has grown to over \$900 million in assets under management across multiple independent broker-dealers.

Learn more about us at [www.lvzinc.com](http://www.lvzinc.com).

<b>Start Date</b>	As soon as available
<b>Hours</b>	Full-time
<b>Salary</b>	\$45,000 - \$60,000/yr. based on experience
<b>Benefits</b>	Paid [individual] health insurance, elected dental & vision Paid time off (13 days) Floating holiday 401k employer match

**To Apply** Submit your resume as application for this role to **hello@lvzinc.com** with **subject line: 'FULL NAME - Trader Application'**