

Title: Analyst (Entry Level), Research Group
Location: San Francisco
Email: researchanalyst@hallcapital.com

Firm Overview

Hall Capital Partners is a privately owned registered investment advisor that builds and manages multi-asset class global investment portfolios for individuals, families, and institutions. We direct more than \$19 billion in investment assets for our advisory clients and pooled vehicle investors. Founded in 1994, our 100+ employees operate from offices in San Francisco and New York. We are typically responsible for investment strategy, asset allocation, and portfolio construction for a globally diversified investment portfolio. For many clients, we also contribute significantly to other aspects of financial strategy, such as managing and diversifying concentrated public stock positions, wealth transfer and philanthropic strategies, and similar matters. Our culture is centered on integrity, client focus, performance, and understanding our fiduciary responsibilities.

The Research Group at Hall Capital Partners (or the “Firm”) includes twenty-one investment professionals (including the Chief Investment Officer) who are organized primarily by investment strategies: equity strategies (long only and long-short); absolute return-based strategies (absolute return/credit and distressed); private equity (buyout, growth and distressed) and venture capital; real assets (real estate, energy, timber); and capital markets. The ongoing research effort involves the identification, evaluation, and assessment of managers, investment themes, opportunities, and risks.

Our investment philosophy and approach are rooted in the experience of investing across several economic and investment cycles and the knowledge that outstanding opportunities can be identified and exploited at all points in these cycles. Over its history, Hall Capital Partners has worked hard to foster relationships within the investment management community to establish the Firm’s reputation as a high-quality fundamental investor and partner. This work has resulted in ongoing deal flow in all asset classes, as well as periodically generating opportunities that do not adhere to standard investment categories. These opportunities can include start-up funds, niche strategies, secondary interests, direct investments, and others.

Job Description

The Research Group is seeking bright, thoughtful investment professionals to join our research team at the analyst level. The position will be based in San Francisco and will begin as soon as possible. The position offers an opportunity to develop investment experience, build knowledge of a wide range of asset classes, and apply best investment practices in an intellectual, collegial environment. Specific responsibilities include:

1. Research and evaluate current and potential investments and market environments. Together with team, meet with existing and potential fund managers to evaluate and analyze investment process, performance, infrastructure, and risk management (includes potential for travel) . Conduct in-depth, fundamental due diligence on equity, absolute return/credit, private equity, or real assets strategies, including interviews of management and professional advisors, and participate in the analysis of financial reports and legal documents

2. Participate in research, analysis, writing, publishing (internally) and presenting investment recommendations
3. Opportunity to attend appropriate conferences and annual meetings to monitor existing managers and evaluate prospective managers and investment opportunities
4. Participate in closing processes of fund commitments for various fund vehicles
5. Prepare presentations to Investment Committee about equity, absolute return/credit, private equity, or real assets markets and opportunities
6. Monitor current investments. Analyst role includes leading monitoring efforts in terms of performance tracking and manager developments

Base compensation is commensurate with experience, and bonus is at the discretion of management.

Job Qualifications

This is an entry level role, and there is no required professional experience. However, the ideal candidate should have a demonstrated interest in investing. The candidate should also demonstrate excellent intellectual depth, strong analytical skills, and capacity for high productivity.

Hall Capital Partners is looking for someone with:

- A college degree, and 0-3 years of work experience following college
- A keen interest in finance and investment management
- Strong analytical, writing, and graphic presentation skills, as well as the ability to think and speak in an organized manner
- Strong interpersonal skills with the ability to meet with fund managers and collaborate with several individuals on multiple projects simultaneously
- Proficiency in Excel, Word, and PowerPoint; knowledge of Bloomberg is helpful

To apply, please send cover letter and resume to researchanalyst@hallcapital.com.