



Position Description

Title: Associate Analyst

Reports to: Lead Investment Analyst

Benefits: Yes

Status: Full time; Onsite in our Warrenton office

About Meridian Financial Partners

Headquartered in Warrenton, Virginia, Meridian Financial Partners provides holistic financial solutions to individuals and organizations nationwide. The firm offers deep expertise and services in investment management, financial planning, and strategic integration of financial resources.

Meridian is one of the rare few that offers unique guidance and solutions to help clients create and manage a clear financial path to their life goals. The firm's partners have earned the unwavering trust of many long-term clients, who enjoy financial peace of mind as a result of the knowledge, customized care and—most especially clarity—that Meridian consistently delivers.

Position Overview

This is an entry-level, salary plus benefits position focused on supporting Meridian's Director of Investments. We are looking for someone with the following skills and characteristics:

- Strong aptitude for financial analysis
- Curiosity about markets and investing
- Working knowledge of Excel
- Critical thinking and attention to detail
- Clear written and verbal communication

About You

You are highly organized, detail-oriented, and take pride in producing accurate, thoughtful work. You enjoy learning, solving problems, and contributing to a team that values professionalism, collaboration, and continuous improvement. You are eager to develop your investment and analytical skills while supporting senior team members and firmwide initiatives. You are excited to work onsite in our Warrenton office alongside the Meridian team.

Job Description and Responsibilities

The Investment Analyst will support our Lead Investment Analyst and have the following responsibilities:

- Support trading functionality
- Support core portfolio responsibilities and investment methodology
- Assist in investment research, data analysis, report preparation
- Assist in developing investment strategies and financial plans for clients
- Support Investment Committee

Qualifications

- Bachelor's Degree in finance, economics, accounting, business, or a related field
- 0-3 work years' experience

Salary and Benefits

- Competitive pay
- Team based incentive plan
- Medical and dental insurance benefits
- Retirement plan match
- Paid vacation