

Job Description - Investor Relations Research Associate/Assistant Account Manager

POSITION SUMMARY:

Shelton Group, a leading investor/public relations firm specializing in the technology industry, is expanding our team and has an excellent career opportunity for an ambitious and detail-oriented business professional. The primary mission of the Shelton Group IR/PR team is to serve as a trusted advisor and partner to client companies, working closely with executive management teams in order to communicate the company's strategy, growth opportunities, financial performance and business initiatives to the financial community, in addition to fulfilling all regulatory requirements. The IR Research Associate/Assistant Account Manager will be an integral member of the Shelton Group IR team in supporting the lead account managers and client company activities.

POSITION RESPONSIBILITIES:

- Collaborate with the Shelton team and client executives to create the client companies' financial communications story and external messaging
- Track specific peer companies' news, developments and earnings reports
- Summarize analyst research notes to highlight relevant and pertinent points
- Gather financial data and assist in tracking financial metrics for client reports
- Assist with crafting investor marketing materials and related collateral, including investor presentations, financial profiles and IR website content
- Manage clients' IR event calendars, including conferences and roadshows
- Research key investor targets for clients and gather relevant data
- Generate briefing materials for client participation at investment conferences, roadshows and one-on-one meetings
- Assist with outreach programs to institutional investor targets and analysts
- Perform valuation and operational analyses to assist with creating key investor messaging and narratives
- Gather marketplace intelligence on an ongoing basis to inform client companies' senior leadership on near-term and long-term market dynamics
- Submit press releases to the national wire circuits and manage clients' investor databases

REQUIRED SKILLS & CHARACTERISTICS

- Strong analytical, verbal and written communications skills
- Financial background or working knowledge of financial statement analysis with ability to interpret financial results and build/maintain financial models in Excel
- Self-motivated with strong work ethic and a desire to excel in the organization
- "out of the box" thinker who can formulate proposed solutions to identified problems
- Highly organized with proven ability to manage multiple projects while maintaining attention to detail
- Ability to prepare presentation materials and make recommendations to C-level executives



- A team mentality with a willingness to do what is necessary for the greater good of the company and the client
- Polished and professional

REQUIRED EXPERIENCE

A successful candidate should possess a Bachelor's degree in related field with experience in the financial field a requirement and in directly in investor relations a plus. Qualified candidates should demonstrate strong computer skills with a proficiency in Microsoft Word, Excel and PowerPoint a must.

OFFICE LOCATION

We are headquartered in Dallas, Texas at 75 and Coit and have a great benefits plan that includes medical, dental, vision, 401k plan, paid holidays and generous PTO. For consideration, ***please send resume with salary requirements to apaddock@sheltongroup.com*** (please send an unzipped Word document). Selected candidates will be contacted – phone and video interviews will be held for qualified candidates. Please see our website at www.sheltongroup.com for more information on the company.