**CORPORATE PROFILE**

Ziegler is a specialty investment bank with unique expertise in complex credit structures and advisory services. Headquartered in Chicago with regional and branch offices throughout the U.S., Ziegler creates tailored financial solutions for our clientele. Ziegler is ranked nationally as one of the leading investment banking firms in our specialty sectors of healthcare, senior living, religion, and education finance as well as corporate finance and FHA/HUD. Ziegler serves institutional and individual investors through our capital markets and full-service wealth management professionals.

**BUSINESS UNIT**

Ziegler Research is an assembly of financial and credit analysts committed to providing investors with research on a selected sub-set of securities consisting of Ziegler-underwritten municipal bonds issued to finance senior living and hospital capital projects, as well as the education and housing sectors. Ziegler Research is separate from Ziegler’s investment banking and capital markets businesses, and, as such, relies only on publicly available information to generate its opinions and reports. The team’s published research carries an analyst certification as to the objectivity of the opinions rendered. Analyst-certified research reports are accessible through ZieglerResearch.com (a limited access, semi-public website), or through a Ziegler financial advisor.

**POSITION OVERVIEW**

1. **Continuing Disclosure (CD) Call Program (30%)**

* Prepare for Lead Analysts: CD Call Notices for Borrowers to post on EMMA
* Update Master CD Call Excel spread sheet on daily basis to remove older calls, update with rescheduled or canceled calls, add new calls
* Weekly: prepare for publication the truncated Master CD Call Excel spreadsheet
* Once published, upload the Analyst Certified Master CD Call Special Report to ZR.com
* Check EMMA for confirmation that CD Notices have been filed by Borrowers
* Follow up with borrowers or their dissemination agents for CD Call Notices that do not show up on EMMA
* Maintain accurate distribution lists for all Lead Analyst’s Outlook invitations to ZR-sponsored CD Calls

1. **Maintain the content of various data fields within ZieglerResearch.com. (30%)**

* Help draft Monthly Analyst Certified Master Credit Outlook List Special Reports
* Endpoint and ZR.com database entries for financial ratios
* Annually review Borrower description field
* Occupancy Statistics (Coordinate with Investment Banking on their graphs)
* Quarterly: LOC expiration date series maintenance
* Upon New Issue, invoke ‘My Portfolio’ alerts for Institutional Investors who own

1. **General Analytical Work and Training (40%)**

* Help with data collection and analysis for annucal CCRC default Study
* Help draft annual CCRC Financial Ratio Median Analysis Special Report
* Until Series 7 licensed, perform as much unpublished analytical work for a portfolio of low-risk borrowers
  + Perform financial ratio analysis based on financial statements
  + Draft Analyst Certified borrower-specific Special Reports
  + Draft Credit Comments

**PROFESSIONAL& PERSONAL QUALIFICATIONS**

The Junior Analyst will possess the following:

* A Bachelor's degree, preferably in finance or accounting
* Obtain Series 7 license by second year of employment date
* Have good written and communication skills
* General education knowledge of financial statements
* Ability to master and navigate various custom-developed web pages
* Computer skills (including Microsoft Word, Excel, PowerPoint
* Work independently and work well with a team
* Good organizational skills and attention to detail
* Ability to multi-task and meet deadlines.

Please apply via email to Ed Merrigan, Managing Director, Municipal Research: [emerrigan@ziegler.com](mailto:emerrigan@ziegler.com).