Role Description

Title: Portfolio Manager
Reports to: Chief Investment Officer
Benefits: Yes
Status: Full Time
Date: June 2019

Role Summary

The Portfolio Manager will work with The Joseph Group's Chief Investment Officer and Investment Committee to oversee key areas of The Joseph Group's investment decision making process. The role will involve conducting research and making decisions at a macro (asset allocation) level as wells as a micro (security selection) level. A successful candidate will:

- Have a holistic view of the investment decision making process (trading, research, portfolio management, education) and willingness to be involved across all levels
- Have a passion for educating the end client and can communicate effectively at various levels of sophistication
- Be self-structured and will be able to deal with multiple inputs and prioritize accordingly
- Be comfortable operating in gray areas and believe investing is both "an art and a science"

Duties and Responsibilities Include

- Asset Allocation/Manager Research/Security Selection
  - Responsible for overseeing ongoing portfolio construction and research initiatives
  - Recommend strategic and tactical asset allocation decisions across TJG's objective-based asset allocation strategies
  - Oversee manager research and selection process across multiple asset classes (High Quality Fixed Income, Credit, Global Stocks, Real Assets, and Dynamic Allocation)
  - Develop and maintain relationships with current and prospective third-party money managers (mutual funds and ETFs)
  - Recommend individual stocks for TJG's "Home Grown Stock Portfolio"
  - Conduct ongoing due diligence on current and prospective managers and individual stocks, and actively communicate updates to the Chief Investment Officer
  - Prepare monthly third-party manager and individual stock tracking dashboards
  - Client specific research projects (non-TJG managed accounts, investment questions, etc.)

- Education and Communication
  - Assist the Chief Investment Officer with financial education and communication to internal and external stakeholders
  - Assist advisors in explaining portfolios and investment concepts in client meetings

- Serve as backup writer for weekly WealthNotes “Inform” pieces and write commentary for plan sponsors and plan participants for TJG’s Retirement Plan Services clients
- Educate Investment Committee members on current events, financial markets, and portfolio construction updates.
- Participate in the firm’s external communication initiatives (Portfolios at Panera, Portfolios and Pints, etc.)

- Trading
    - Understand the trading process and TJG’s trading software
    - Make mutual fund, ETF, and stock trades on an individual and model basis as needed
    - Serve as a backup trader for the Investment Operations Associate

Qualifications

This position typically requires the following qualifications:

- CFA and/or CAIA designation preferred
- Work experience that demonstrates investment acumen as well as people and teamwork skills
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook
- Excellent communication, listening, and relationship building skills
- Strong project management skills – organized, detail-oriented and able to multitask and prioritize
- A passion for caring for clients
- A team player in The Joseph Group’s “Best Places to Work” culture
- Desire/ability to work successfully in a small company environment
- Proactive, self-motivated personality
- Experience with investment platforms and/or client service

Salary and Benefits

Pay/benefits are competitive based on industry standards.

- Salary will be based on experience
- Benefits include health care, 401(k)
- Partial and/or full financial support for professional accreditation/continuing education requirements and other education/training opportunities

Contact

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