THE JOSEPH GROUP
CAPITAL MANAGEMENT

Title: **Portfolio Manager**
Reports to: Chief Investment Officer
Benefits: Yes
Status: Full Time

Job Summary

The ideal candidate will have excellent communication and relationship building skills as they will be a key representative of The Joseph Group's investment philosophy and process to The Joseph Group's clients, The Joseph Group's Advisor Team, and external research and asset manager partners. Strong presentation skills are necessary as the Portfolio Manager will be tasked with providing investment education to both firm clients and prospects. Building an understanding of The Joseph Group's "Plan, Purpose, Portfolio" philosophy, along with our commitment to objectives-based portfolio management will be essential. The Portfolio Manager is likely to serve as a primary point of contact for "investment only" clients. The Portfolio Manager will be a first point of contact with external research and asset manager partners and will work closely with The Joseph Group's Senior Investment Analyst on investment research and portfolio construction ideas. The Portfolio Manager will also exhibit a complete understanding of investment operations and the interplay between investment research decisions and operational deployment. Key qualities include a passion for educating clients and prospects and the ability to navigate a dynamic position that will have the Portfolio Manager operating at a variety of levels with a large degree of variation from day-to-day.

Duties and Responsibilities

- **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 on both Wealth Advisory and Retirement Plan services sides of the business
    - Contribute through writing to the shared responsibility of 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 Your Place, Portfolios and Pints, etc.)
    - Potentially serve as lead contact/relationship manager to Investment Only clients

- **Investment Research**
    - Develop and maintain relationships with current and prospective third-party money managers (mutual funds and ETFs) in conjunction with TJG's Senior Investment Analyst

- Assist TJG's Senior Investment Analyst in conducting ongoing due diligence of current and prospective managers and individual stocks, and actively communicate updates to the Chief Investment Officer
- Assist TJG's Senior Investment Analyst in the recommendation of strategic and tactical asset allocation decisions across TJG's objective-based asset allocation strategies

- **Investment Operations**
  - Understand the trading process and TJG's trading software
  - Be able to make recommendations that take into account operational considerations and constraints

Qualifications

The Portfolio Manager position typically requires the following qualifications:

- To embrace and live our Core Values of Integrity, Teamwork, Humility, Excellence, and Enthusiasm
- Bachelor's degree from an accredited college or university
- 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

Send resume and cover letter to:

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The Joseph Group is an Equal Opportunity Employer