Bridges Trust is a privately-owned wealth management firm providing comprehensive trust, wealth management, family office, and strategic planning services for a growing client base of successful individuals and families, endowments and foundations, business owners, and corporations. Our experienced team of professionals in investments, trusts, and philanthropy are dedicated to helping our clients develop and implement innovative and effective strategies to preserve and maximize their wealth across generations.

Bridges Trust is built on the tenacity and ethic of our team members. We are united in our commitment to deliver expertise and unparalleled service and look forward to adding team members who align with our values of *trust, service, excellence,* and *performance*.

About the role

The **Portfolio Manager** position supports the Relationship Management team in its primary function of actively managing client investments accounts and the coordinated delivery of services to individuals, families, trusts and foundations. The Portfolio Manager will be the second point of contact on the relationship management team in managing and developing client relationships, while reporting to their assigned relationship manager.

What you'll do

- Propose and implement investment programs as directed by the Relationship Manager(s) and the Investment Policy Statement.
- Prepare investment guidelines and strategies for client accounts in line with clients' goals and risk tolerance.
- Assist in the creation and documentation of the Investment Policy Statement.
- Gathering, analyzing, and documenting client's and prospective client's financial information.
- Prepare financial reporting, charts and materials for client meeting presentations using Excel, Word, PowerPoint, and internal applications as needed.
- Assisting with drafting proposals, presentations, reference material, financial plans and other documents as required.
- Assist the relationship manager with developing new business from existing and new relationships.
- Engage in various continuing education opportunities in order to expand personal knowledge as well as represent the firm in the professional community.
- Represent Bridges Trust in business related and professional activities in order to develop, manage and retain client relationships.

Qualifications

- Bachelor's degree required.
- Graduate degree and/or relevant professional certification (CFA/CFP) preferred.
- Series 65 license required within 6 months.
- A **minimum of 5 years** financial services / wealth management experience.
- Knowledge of fiduciary and financial products and services, usually acquired through related work experience, is required to manage client accounts.
- Technical knowledge of investments, tax, legal, and operations usually acquired through formal education or related experience is required to service clients.
- Analytical & independent problem-solving skills.
- Written and verbal communication skills.
- Demonstrated leadership and teamwork qualities.
- Results driven, detailed oriented and a motivated self-starter.
- Organizational skills and ability to manage multiple tasks.
- Proficiency with Microsoft Office.

In joining our team, you will work with talented, high-achieving people who come together to serve and support our clients and each other. We offer highly competitive pay and benefits with professional development and growth opportunities.

EEO statement

Bridges Trust is an equal opportunity employer that is committed to diversity and inclusion in the workplace. We prohibit discrimination and harassment of any kind based on race, color, sex, religion, sexual orientation, national origin, disability, genetic information, pregnancy, or any other protected characteristic as outlined by federal, state, or local laws.

Apply Here: https://ats.rippling.com/bridges-trust/jobs/61c5e9b0-a6a7-4aae-97de-3a58c3f2d697