

Title: Institutional Portfolio Manager

Location: Various States

Job Description: **JOB SUMMARY**

Creative Planning's **Portfolio Manager** works under the Director of Institutional Services. The Manager's primary responsibility is to manage their institutional team's accounts by weekly reviewing for opportunistic rebalancing and cash investment needs. The Portfolio Manager is responsible for all trades, distribution requests and management of the strategy intended. In addition, a successful Portfolio Manager will also have business development responsibilities related to data analytics and creating proposals.

JOB DUTIES

Portfolio Management

- Review investment policies for both clients and prospects
- Create customized asset allocation and implementation plans for new clients
- Monitor existing portfolios for rebalancing needs
- Monitor cash flow requirements
- Work with Director of Fixed Income

Business Development

- Complete RFPs as needed
- Assemble pitch decks
- Run portfolio analysis for prospects

Reporting

- Evaluate performance reports and provide quarterly updates
- Build custom reports
- Updating cost basis

REQUIRED EXPERIENCE / QUALIFICATIONS

- Bachelor's degree
- Series 65 (or equivalent substitute) attained within 120 days of hire

PREFERRED EXPERIENCE / QUALIFICATIONS

- Financial services experience
- MBA, or CFA (or CFA candidate)

TECHNICAL SKILLS

- MS Office/Windows experience
- Orion experience preferred
- Understanding of statistical data