# Assistant Portfolio Manager

**Essential Functions:**

Supports the Portfolio Management function for modeled IRAs and Investment Management accounts to ensure compliance with the institution's established policies and procedures.

- Serves as primary account manager for Modeled IRAs and Investment Management accounts consistent with goals established for the account and the investment plan.
- Participates in presentations to clients and employee groups; Meets with 401k participants to provide guidance and information.
- Actively calls on clients to review strategy and objectives; Coordinates investment plan utilizing asset allocation models; Assists clients as necessary.
- Supports Portfolio Managers by coordinating portfolio reviews, filling bond inquiries and assisting in management of assigned accounts through documentation of the investment plan, investment research and tax planning guidance.
- Maintains business and professional community contacts to enhance company's business opportunities; Researches and identifies prospective clients.
- Executes fixed income trades for Portfolio Managers, determining the most profitable actions for both the customer and the financial institution.
- Seeks out and analyzes the investment recommendations and economic forecasts of investment services and outside sources; Recommends investment strategies to management concerning market trends, buy and sell activities and pricing.
- Provides assistance in investment planning and investment portfolio management services.
- Maintains information base on market trends and issues.
- Conforms to General Performance Expectations as identified for all employees.

**Qualifications:**

- BS or BA degree in related field of study required
- Specialized investment management education and training
- Two or more years experience and/or formal training in related position; Investment experience preferred
- Good interpersonal communication skills and thorough knowledge of all trading activities and functions.

EOE