

Title: Client Portfolio Manager
Department: Equity

Summary:

The Client Portfolio Manager is responsible for communicating the investment strategy, process and performance of the International Small Cap, Global Small Cap and Emerging Markets strategies to existing and potential clients. An extensive understanding of equity markets and demonstrated client service, sales or portfolio management experience is required.

Responsibilities:

- Participate in strategy and investment meetings and serve as an integrated part of each investment team
- Partner with the distribution teams to support client service and business development efforts across channels (institutional, advisory and private client)
- Serve as a resource to Portfolio Managers, Relationship Managers, Marketing, Client Service and Sales to build client relationships, retain assets and resolve complex client issues
- Prepare ongoing investment updates, quarterly investment commentary and client specific written requests
- Present investment process, strategy performance and equity market updates to current clients and prospects (in person and by phone) and our internal sales team
- Make finals presentations
- Participate on investment panels
- Partner with the Marketing and Sales teams to develop creative marketing materials and presentations
- Act as a resource for the Marketing team throughout the RFP process providing information and support on technical questions.

Qualifications:

- Bachelor's degree and CFA required
- 5-10 years of related industry experience with extensive equity investment and product knowledge
- Excellent presentation and written skills
- Strong communication skills and the ability to present investment strategies to a wide range of clients
- Demonstrated sales and client relationship management skills
- Ability to analyze, interpret and effectively communicate investment concepts
- Collaborative, team oriented individual with demonstrated ability to support others
- Superb organizational skills and ability to prioritize competing demands
- Travel required