

Assistant Investment Counselor/Portfolio Manager

Clifford Swan Investment Counselors
Pasadena, California

Firm Overview

Clifford Swan Investment Counselors is an independent, 100% employee owned registered investment advisor serving high net worth individuals, families, and not-for-profit organizations. With approximately \$3 billion in assets under management, Clifford Swan is committed to providing objective investment management and financial advice with personalized, responsive client service.

Position Overview

Assistant Investment Counselors/Portfolio Managers work closely with senior investment counselors to deliver wealth management services to Clifford Swan clients. The Assistant Investment Counselor/Portfolio Manager will join a team of eleven other investment professionals providing investment counsel, portfolio management, and capital markets analysis to high net worth and institutional clients.

Job Responsibilities

Reporting to senior investment counselor(s), the Assistant Investment Counselor/Portfolio Manager scope of work includes:

- Analyze investment portfolios; develop asset allocation strategies to meet client objectives
- Implement portfolio management strategies utilizing individual equity and fixed income securities approved by the Clifford Swan Investment Committee
- Identify investment trends, review and organize data, synthesize information, interpret company and industry data to support investment strategies that meet client objectives
- Gather and analyze historical and current capital market data to prepare exhibits and other client presentation materials
- Invest new accounts, review and apply client guidelines, monitor cash flow, address client requests
- Work on special projects related to client investment and financial planning

Qualifications

- Demonstrated interest in investments and the capital markets, fulfilled by some or all of the following:
 - Bachelor's degree in a related subject area with a record of high academic achievement
 - Knowledge/experience in wealth management industry (for example, RIA, private bank, or trust company)
 - CFP, CFA, or MBA a plus but not required
 - Fixed income experience a plus
- Strong quantitative, analytical, and communication skills
- Proficiency in Microsoft Excel, Word, and PowerPoint
- Proficiency in Bloomberg, Thomson Reuters Eikon, Advent Moxy, and Advent Portfolio Exchange (APX) desirable
- A demonstrated ability to work independently and collaboratively as part of a team
- An ability to assign priorities to multiple concurrent, competing requests while ensuring accuracy, completeness, and timeliness
- Candidates must be eligible to work in the United States without sponsorship or restriction

All applications must include a resume and cover letter. Please send this information by Friday, April 6th to Jennifer Maqueda via email at JMaqueda@cliffordswan.com or mail to 177 E. Colorado Blvd., Suite 550, Pasadena, CA 91105.