Investment Officer Opportunity

Harbour Trust is seeking an Investment Officer with strong analytic and communications skills to execute investment security trades. The full-time position reports to the SVP & Chief Investment Officer.

Harbour Trust Investment Strategy:

- Based on prudent, time-tested principals to generate competitive risk-adjusted investment returns and to help our clients achieve their financial goals.
- Select individual securities and construct diversified investment portfolios by employing Large-Cap Equity and Investment-Grade Fixed Income styles
- Execute tactical portfolio adjustment across our strategic asset allocation spectrum

Responsibilities of the position:

- Provide intellectual data required to maintain consistent execution of firm’s investment and cultural philosophies
- Apply best practices to ensure accuracy and mitigate risks to HTC and clients
- Maintain and build trusting relationships by satisfying internal and external client service requirements with care and integrity
- Represent the Company with great professionalism

Duties of the Position

- Executes (most) investment processes including securities trading for the firm’s stocks, bonds, mutual funds and stock options
- Rebalances ETF Model accounts on a quarterly basis, invests new cash in ETF accounts monthly and raises cash for distributions in small portfolios
- Maintains relationships with institutional brokers and collaborates with Operations Division to resolve settlement issues
- Coordinates bond maturity reinvestments with Advisors, recommends securities for reinvestment and stages bonds for purchase into the trading platform
- Performs investment reviews for trust, investment management and institutional accounts
- Assists Portfolio Managers with account onboarding activities and financial plans
- Supports the department’s functions administratively by preparing research and reports for client and committee meetings
- Develops investment proposals based on the individual client’s financial goals
- Monitors global macro-economic conditions and financial market trends and analyze the potential impact on Company investment strategy and client investment portfolios
- Monitors fundamentals of the Company’s Equity and Fixed Income positions
- Participates on the Investment Committee, making asset allocation strategy and individual asset selection recommendations for the company
- Complies with legal and regulatory requirements and Company policies and procedures

Candidate Requirements:

- Bachelor's degree in Business, Economics, Accounting or Finance
- 2-5 years’ experience as an Investment Trader/Officer in a banking or securities industry preferred
- Knowledge of investment security characteristics

- Familiarity with Individual Retirement Account and Investment Management Account investment practices
- CFA designation/candidate or Series 7 preferred

The Right Candidate possesses:

- Attention to detail is of primary importance
- Sharp analytic and math skills
- Strong Excel and Adobe skills
- Excellent organizational skills, effectively manages time and priorities
- Writes clearly and informatively, edits work for spelling and grammar
- Openly and respectfully questions colleagues to gain clarity and understanding
- Must professionally maintain confidential information

All interested candidates are invited to contact Nora Akins (219) 873-1735.