Portfolio Manager

Harbour Trust is seeking an experienced Portfolio Manager with strong analytic and communications skills to manage high net worth investment portfolios. 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 client 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 analysis of investment and account data to provide above-average investment returns.
- Apply best practices to ensure accuracy and mitigate risks to HTC and clients.
- Maintain and build trusting relationships by satisfying internal and external client requirements and requests with care and integrity.
- Represent the Company with great professionalism.

Duties of the Position

- Provide excellent client service.
- Collaborate with Financial Advisors and high net worth clients to develop investment objectives and construct appropriate investment portfolios.
- Perform investment reviews for trust, investment management, and institutional clients.
- Invest assets according to Investment Policy guidelines to deliver a competitive risk adjusted return.
- Assist Advisors in the development of new business opportunities by meeting with prospects, preparing, and presenting proposals for investment management.
- Present investment strategy and performance updates to clients and Advisors.
- Monitor global macro-economic conditions and financial market trends and analyze the potential impact on Company investment strategy and client investment portfolios.
- Monitor fundamentals of the Company's Equity and Fixed Income positions.
- Comply with legal and regulatory requirements and Company policies and procedures.

Candidate Requirements:

- Bachelor's degree in Business, Economics, Accounting or Finance.
- 10+ year experience as an Investment Portfolio Manager in a banking or securities industry.
- Experience managing individual security Large-cap Equity and Investment Grade Fixed Income portfolios.
- Experience analyzing individual equity and fixed income securities.
- Experience working with and presenting to high net worth clients and prospects.
- CFA preferred.
- Ability to travel and work remotely (as needed).

The Right Candidate possesses:

- 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 applicants please submit your resume to info@harbourtrust.com