FULCRUM
CAPITAL

Associate Portfolio Manager

This is a great opportunity for an Associate Portfolio Manager with a passion for investing to join one of the fastest-growing independent wealth advisors in the Pacific Northwest.

The Associate Portfolio Manager is responsible for ensuring all the firm's client portfolios are aligned with objectives. As a voting and contributing member of the firm's Investment Committee, the Associate Portfolio Manager also analyzes portfolios, manages composites, and conducts investment research. This position reports to the Chief Investment Officer and is located in downtown Seattle.

Responsibilities

- Collaborate with advisors to develop and manage investment portfolios that meet the needs of each client within the framework of the firm's investment philosophy and discipline
  - Maintain allocation and security level models as directed by the Investment Committee
  - Independently monitor and suggest rebalancing proposals for client portfolios
  - Collaborate with Advisors to design and implement portfolio transitions
  - Ensure client portfolios track within performance expectations
  - Identify and perform portfolio enhancements such as tax loss harvesting, asset location assessments, and tactical initiatives such as sector drift, sustainability (ESG) analysis, asset/liability matching, and risk tolerance deviations
- Analyze client and prospect portfolios and present written and oral recommendations to advisors
- Continually identify ways to improve our portfolio management framework and trading process
- Administer the firm's performance composites
- In conjunction with the Chief Investment Officer, develop investment-related presentation materials and proposals to assist Advisors in existing and prospect client meetings
- Monitor and make recommendations regarding corporate actions of securities and managers
- Vote all proxies in accordance with the firm's proxy voting policy and client specific directives
- Document the firm's portfolio management, trading, and composite policies and procedures
- Guide Investment Operations Analysts regarding investment decisions and provide backup support for trade execution
- Serve as secondary contact for external manager and other external relationships pertaining to the investment team
- As a member of the Investment Committee:
  - Perform in-depth, fundamental research on stocks to support management of Fulcrum's U.S. Large Cap portfolio
  - Support the investment research priorities and manager due-diligence efforts as set by the Chief Investment Officer
    - Support the firm's Environmental, Social, Governance (ESG) strategy and messaging
    - Research, monitor and make recommendations for securities held in client accounts that are not on Fulcrum's approved list

- Analyze and make recommendations for securities, managers, strategic allocations, or topics as assigned by the Chief Investment Officer

- Collaborate with client service and operations teams to build a scalable client service experience by leveraging technology and implementing efficient business processes
- Provide back-up to Support Advisors and client service team on reporting, transactional, administrative, and operational tasks as needed
- Recruit and manage interns and mentor junior investment professionals

Qualifications and attributes

- Minimum 5 years of experience in investment management/wealth management with demonstrated ability to administer and manage portfolios
- Bachelor's Degree from an accredited college or university in a finance-related field required
- Ability to employ advanced analytical functions within Microsoft Excel required
- Have or working toward Chartered Financial Analyst® designation preferred
- Familiarity with Schwab Institutional and with rebalancing tools like Tamarac preferred
- Experience with Bloomberg with focus on portfolio attribution and risk modelling preferred
- Strong organizational skills, quick problem-solving and analytical skills, and high attention to detail
- Excellent written and verbal communication skills
- Able to make decisions, persuade others, and be persuaded in the face of uncertainty or adversity
- Open-minded, curious, and driven toward continuous improvement
- A team player
- Highly proactive and self-motivated

Compensation and benefits

- Pay and benefits competitive with industry standards
- Base salary determined by experience and education
- Full benefits including healthcare, bus pass, gym membership, and profit sharing
- Support for relevant career development opportunities

Company Description

Fulcrum Capital attracts and retains the most talented, credentialed, and community-minded professionals in wealth management. Every member of our seasoned team is passionate about helping clients achieve their financial goals.

Founded in 2007, Fulcrum Capital, LLC is an independent Registered Investment Advisor headquartered in Seattle. Our clients are individuals, families, and nonprofits with vision, character, and integrity. Clients choose Fulcrum because they want to know what they own and be confident that their holdings align with their values. Our clients and team members value our independence, transparency, and thought leadership, particularly in the realm of sustainable investing. We value diversity and support work-life balance. Our firm is 100% employee-owned and majority-women-owned.

<u>Qualified candidates please contact:</u>

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