FULCRUM
CAPITAL

Portfolio Manager

August 4, 2025

Are you a seasoned investment professional ready to shape portfolio management and research with an independent wealth advisor making waves in the Pacific Northwest? We're seeking a strategic, client-focused Portfolio Manager to join our dynamic team. You'll play a critical role as a voting member of our Investment Committee, leading research initiatives, managing select client portfolios, and serving as an ambassador for our investment approach through written and verbal messaging – all while working alongside an exceptional, diverse team committed to using finance as a positive force for change.

What You'll Do:

Investment Leadership: As a voting member of our Investment Committee, drive intellectually stimulating discussions that generate actionable investment decisions. Research and evaluate global economic trends, investment themes, individual securities, and third-party managers in traditional and alternative asset classes. Contribute to forecasts, model portfolios, and tactical allocation decisions.

Portfolio Management: Collaborate with Wealth Managers to develop investment policies and manage diversified portfolios that meet each client's unique needs within our investment philosophy and discipline. Monitor portfolios for deviations, execute rebalancing strategies, and implement sophisticated approaches including tax-loss harvesting, concentrated stock strategies, ESG integration, asset location optimization, and risk management techniques.

Client Partnership: Serve as the investment expert on select client service teams, sharing our approach and market outlook with clients and prospects. Analyze existing and prospective client portfolios and recommend transition strategies that align with their objectives and values.

Thought Leadership: Compile content for internal and external investment communications, represent Fulcrum at industry conferences, and contribute to our reputation for innovative portfolio management, particularly for business owners, foundations, and nonprofits.

Process Innovation: Continuously enhance our portfolio management and research framework through technology adoption and process improvements that elevate the client experience.

Team Development: Recruit and mentor investment professionals and interns, guide analysts and traders, and provide backup support across the investment team.

What You'll Bring:

Professional Excellence: Minimum 8 years of professional investment experience for institutions or private clients, including at least 5 years of portfolio management, stock analysis, and/or manager research experience.

Credentials & Education: Bachelor's degree in finance or related field from an accredited institution and CFA designation required. CAIA, CFP, and MBA preferred.

Analytical Expertise: A passion for investment analysis coupled with strong problem-solving and analytical skills, high attention to detail, and the ability to make sound decisions, influence others, and adapt perspectives when faced with uncertainty.

Technical Proficiency: Advanced modeling skills in Excel, Bloomberg, Morningstar Direct, Tamarac, and other industry platforms.

Communication Excellence: Outstanding written and verbal communication skills with the ability to clearly explain complex investment concepts to clients and colleagues at all levels.

Specialized Knowledge: Experience with private markets, alternative investments, ESG integration, and values-aligned investing strongly preferred.

Personal Attributes: Collaborative team player with a growth mindset—curious, open-minded, proactive, and driven toward continuous improvement while valuing diverse perspectives.

Values Alignment: A commitment to upholding our core values of independence, excellence, integrity, and community in all aspects of your work.

Why You'll Love Working With Us:

Finance as a Force for Good: Be part of a firm committed to improving the lives of our clients and our community. We contribute 10% of annual profits to charity and specialize in helping foundations, endowments, families, and business owners align their investments with their missions.

Employee Ownership: Thrive in our 100% employee-owned structure where your contributions directly impact firm success, and you have a voice in strategic decisions that shape our future.

Diverse Excellence: Join a majority women-owned firm where diverse perspectives (25% non-white) drive superior investment decisions and create an inclusive culture of mutual respect and collaboration.

Thought Leadership Recognition: Contribute to our established reputation as industry leaders in stock, bond, and alternative investments; foundation and endowment management; sustainable investing; and values-aligned portfolio strategies for successful individuals, families, and business owners.

Intellectual Stimulation: Engage in sophisticated investment research, explore emerging themes in sustainable investing, and contribute thought leadership that shapes industry conversations.

Autonomy with Support: Enjoy the independence and agility of a boutique firm while having the resources, technology, and collaborative team support to excel in your role.

What We Offer:

Competitive Compensation: Base salary ($160,000 - $200,000) determined by experience and education, competitive with industry standards. Bonus potential based on individual and firm success.

Employee Ownership: Participate in our employee-owned firm's success through profit sharing opportunities and potential for future ownership stakes.

Comprehensive Benefits: Full benefits package including healthcare, dental, vision, 401(k) with matching, long-term disability, transit pass, and wellness benefits.

Professional Development: Investment in your growth through conferences, continuing education, industry certifications, and leadership development opportunities.

Results-Focused Flexibility: We maintain high standards while supporting different working styles and life circumstances, enabling you to deliver exceptional results while improving your quality of life.

Who We Are:

Founded in 2007, Fulcrum Capital is an independent Registered Investment Advisor headquartered in Seattle. Our clients are foundations, endowments, successful business owners, and families who seek a more thoughtful approach to investing. We believe finance is a force for positive change and demonstrate this commitment by contributing 10% of our annual profits to charity. Our clients choose Fulcrum because they want to know what they own and be confident that their holdings align with their values. We're recognized thought leaders in foundation and endowment management, as well as innovative portfolio strategies for business owners and executives. 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 majority women-owned and all of Fulcrum's owners work at the firm; we are 100% independent.

Qualified candidates please contact:

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