

FIXED INCOME PORTFOLIO MANAGER

Summary Expectations

The Fixed Income Portfolio Manager will report directly to the Lead Portfolio Manager and serve as a member of Separate Accounts Investment Committee. This individual will focus on the fixed income markets and select investments to meet portfolio objectives and deliver positive returns for investors. The Fixed Income Portfolio Manager will market the Firm's fixed income strategies to both internal and external financial advisors and prepare periodic reviews and quarterly strategy Fact Sheets. This position is based in Summit, NJ.

Primary Responsibilities

- Conduct quantitative and qualitative research to identify prospective investments for inclusion in client portfolios.
- Solve complex investment situations for clients and advisors according to their investment criteria to create customized fixed income strategies.
- Possess a thorough understanding of a broad range of bonds, ETF's and various asset allocation techniques.
- Stay current in industry knowledge and macroeconomic developments for early identification of trends, risks, and opportunities.
- Produce topical content and white papers on industry for executives and board members.
- Market portfolios to Cary Street Partners' financial advisors and to external advisors.
- Evaluate accounts of current and prospective clients, make recommendations to improve portfolios, given individual goals, requirements, and risk tolerance.
- Travel as needed to meet with fund managers, financial advisors, and prospective clients.
- Model the highest ethical standards in all business activities.

Professional Experience

- Minimum 5 years of fixed income portfolio management experience with thorough understanding of the industry.
- Deep understanding of capital markets.
- Experience with portfolio construction across multiple asset classes and investment structures.
- CFA/MBA preferred.
- Experience with major credit ratings agencies, such as Moody's, S&P & Fitch.
- Deep knowledge of separate account management, Bloomberg and trading tools, such as Moxy/Axys.

Personal Attributes

- Ability to take initiative and create opportunities with minimal supervision, while working cooperatively as part of an investment team.
- Excellent analytical and critical thinking skills.
- Excellent communication and interpersonal skills with different audiences.
- Strong Microsoft Office program skills.
- Mindset of constant improvement, whether in operational efficiency or in delivering greater value to clients.

- Ability to work under high pressure and within time constraints.
- Willingness to take on projects, outside of regular scope of work, as assigned by Chief Investment Officer.

To apply, please send a cover letter and resume to lissie.stagg@carystreetpartners.com.

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability or veteran status.