

VIGILANT Capital Management, LLC

JOB POSTING: Portfolio Manager

DATE: April 2022

Vigilant Capital Management (Vigilant), a growing wealth management firm with more than \$2.2 billion of assets under management, is looking for an experienced Portfolio Manager (PM) to join its dynamic and talented team. The PM is responsible for delivering the Firm's investment management philosophy and process to a group of assigned high net worth and ultra-high net worth individuals and families. The PM also contributes directly to the Firm's value proposition through investment research activities as a member of the Investment Policy Committee.

This role is based out of our Portsmouth, NH office. Vigilant is a hybrid work environment with a combination of working in the office and from home. Traveling to meet clients as requested is expected as well as attending meetings in the other corporate office. The majority of travel will be New England based.

ESSENTIAL JOB FUNCTIONS:

- Work closely with the assigned Wealth Advisor (WA) on each client team to identify client objectives and develop and monitor asset allocation, financial strategy and investment policies.
- Maintain an up-to-date Investment Policy Statement (IPS) for each client relationship that outlines the client's unique goals and objectives, liquidity needs, tax status, special account guidelines, and risk tolerance – ultimately arriving at an appropriate asset allocation structure.
- Apply the Firm's tactical investment strategy to the unique characteristics of the client's IPS. Activities associated with this responsibility include, but are not limited to: 1) constructing, managing and monitoring client portfolios; 2) supporting the tactical investment strategy of the Firm and establishing appropriate trade orders; 3) communicating strategy, activity and performance with clients; 4) adhering to all parameters of the Firm's compliance policies and procedures.
- Actively contribute to the investment research function and is a participating member of the Firm's Investment Policy Committee (IPC). The PM is expected to conduct thorough investment analysis of assigned sectors/industries, research and evaluate specific equity and credit securities, and communicate perspective and opinions to IPC members regularly.
- Follow and bring their perspective on macroeconomic trends (top down) and determine reasonable security valuation (bottom up) for assigned sectors/industries.
- Represent the Firm brand with clients and within the community. The PM supports the Wealth Advisor (WA) in their activities to attract new client assets to the Firm.
- Participate in the enrichment of the Firm's culture and working environment:
 - Develop strong working relationships across all organizational functions of the firm
 - Positively influence the professional environment of the Firm and the growth profile of the organization
 - Proactively bring ideas and opinions to the senior management team, particularly with any issues impacting the high-quality client experience the Firm aims to provide
- Play an active role in various operational committees – prepare and contribute thoughts for agendas, raise concerns, suggest solutions, look for and implement efficiency and process improvement .
- Other miscellaneous tasks and responsibilities, where the above list is not intended to be all-inclusive.

EDUCATION, QUALIFICATIONS AND EXPERIENCE

- At least 3 years of experience in the financial services industry, preferably working with high/ultra-high net worth individuals and families
- B.A./B.S. required, preferably in accounting, finance, economics or related field
- CFA, CPA, MBA or similar relevant advanced educational or professional designations (designee or currently pursuing)
- Strong analytical capabilities and demonstrated equity ability to perform equity and/or credit security analysis
- Ability to adeptly handle confidential information and sensitive situations - position continually requires discretion, tact and diplomacy
- Ability to manage a diverse set of tasks in an organized and proactive way
- Ability to work both in a team-oriented environment and independently
- Knowledge of, and strict adherence to internal compliance policies and procedures
- Ability travel for client/prospect meetings and other job-related activities, as well as between offices – currently located in Maine and New Hampshire
- Series 65 is a requirement of the position and will be financially supported, as needed, by the firm

WHY WORK AT VIGILANT CAPITAL MANAGEMENT:

- Fantastic office locations in downtown Portland, ME and Portsmouth, NH
- Very competitive salary and bonus plan
- Excellent benefits
 - Employer-paid employee health insurance
 - HSA contribution
 - Employer-paid employee dental and vision plan
 - Employer-paid life and disability plans
 - Profit-sharing contributions, with exclusive company-managed investment option
- Generous PTO plan
- Support for professional designations and continuing education
- Bi-annual company events
- And more

NO PHONE CALLS OR RECRUITERS PLEASE

Vigilant Capital Management is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, age, sex, sexual orientation, gender identity, national origin, disability, veteran status, or any other status protected by law.