

FIRM SUMMARY

Diversified Trust is an employee-owned comprehensive wealth management firm based in the Southeast with over \$7 billion of client assets under management. Our clients include individuals, multi-generational families, family offices, foundations, endowments and retirement plans. We provide tailored investment management, financial planning, trust and estate, family office, and institutional advisory services through our offices in Atlanta, Greensboro, Memphis and Nashville.

POSITION

Portfolio Construction Analyst

OFFICE

Atlanta

SUMMARY

Diversified Trust is a growing company, looking to add to our Atlanta Investment Team. We are seeking highly motivated, service-oriented, entrepreneurial-minded individuals to join us.

CONTACT

HR-Atlanta@diversifiedtrust.com

FOR MORE INFO

ON DTC

diversifiedtrust.com
Please review our videos.

FLSA STATUS: EXEMPT

DISCLAIMER:

This position description is not intended, and should not be construed to be, an exhaustive list of all responsibilities, skills, efforts or working conditions associated with the job. It is intended, however, to be an accurate summary of those principal job elements essential for making decisions related to job performance, employee development and compensation. This position may be required to perform other duties and responsibilities as assigned.

Job Summary:

The investment team is charged with developing asset allocation advice and model portfolios for use with high net worth families and institutions. The team also selects and oversees the outside managers used to fulfill specific mandates on our platform. Diversified Trust utilizes a number of proprietary commingled vehicles to invest client assets with outside managers, with the team functioning as a manager of managers for substantial pools of capital that are similar in size to some of the largest institutional investors.

This position is responsible for working with asset class leaders (fixed income, equities, private investments and hedge funds) on portfolio construction and risk management. This person will also be charged with maintaining the asset allocation models for the firm. Responsibilities of the Investment Department include overall asset allocation recommendations, investment strategy research and implementation, ongoing due diligence of existing strategies and investment managers, researching new strategies for investment platform inclusion, and communicating investment strategies and performance within the firm as well as externally to clients.

Primary Duties and Responsibilities:

- Oversee the portfolio analytics and risk management process for the investment team
- Analyze macroeconomic market trends and investment strategy opportunities
- Create and maintain quantitative models in Excel, Python, or other statistical analysis packages
- Participate in investment manager meetings and investment team strategy sessions
- Handle and respond to inquiries from client service team members
- Perform due diligence on current and prospective investment managers
- Some travel to visit managers or other company locations

Skills/Competencies necessary for this job include:

- Bachelor's degree in Business or related field, or equivalent education and related training; advanced degree in finance, engineering or mathematics preferred
- CFA designation required or in progress
- 7+ years of investment advisory, asset management or comparable experience preferred
- Experience with investment manager due diligence and portfolio construction
- Experience with financial/investment technology platforms; proficiency in Excel and PowerPoint applications
- Experience with FactSet or MPI Stylus preferred; Python a plus
- Strong analytical abilities and linear thought orientation; excellent problem-solving abilities
- Strong work ethic with a motivated and driven ownership mentality
- High attention to detail and comfortable with large amounts of data
- The ability to work under pressure and handle multiple tasks within deadlines
- Ethical practitioner with the ability to exercise sound judgment and effectively manage risk
- Ability to develop trust and build internal and external relationships in a team environment
- Excellent writing and communication skills
- Adaptable in a rapidly changing environment

*If this job seems like a good fit, please email your resume to
HR-Atlanta@diversifiedtrust.com*