

FIRM SUMMARY

Diversified Trust is an employee-owned comprehensive wealth management firm based in the Southeast with over \$8 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

Vice President - Manager Research

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@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:

This position is responsible for working with asset class leaders (fixed income, equities, private investments and hedge funds) on due diligence and selection of third party investment managers in multiple asset classes, including over \$3 billion in multi-manager portfolios. As part of the investment team, the VP-Manager Research would also contribute to 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:

The primary responsibilities of the VP - Manager Research position include, but are not limited to, the following:

- Manage the due diligence process on both existing and prospective managers for the investment team, with a focus on equity and hedge fund strategies
- Participate in investment manager meetings and investment team strategy sessions
- Function as an integral member of the investment team, with responsibility for sharing information and reporting to the team on key manager issues
- Analyze macroeconomic market trends and investment strategy opportunities to assist with firm asset allocation policy
- Help build monthly reporting deck for client service teams on macro and strategy level positioning
- Report on manager and strategy portfolio allocations to client service teams
- Handle and respond to inquiries from client service team members
- 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 a plus
- CFA designation or intent to progress towards the designation required
- 7+ years of investment advisory, asset management or comparable experience preferred
- Experience with investment manager due diligence and portfolio construction; experience with alternative strategies a plus
- Excellent writing and communication skills
- High attention to detail and level of organization
- Experience with financial/investment technology platforms; proficiency in Excel and PowerPoint applications
- Experience with FactSet or MPI Stylus a plus
- Ethical practitioner with the ability to exercise sound judgment and effectively manage risk
- Strong analytical understanding and linear thought orientation; excellent problem-solving abilities
- Strong work ethic with a motivated and driven ownership mentality

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