

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

Fixed Income Analyst /
Assistant Portfolio Manager

OFFICE

Memphis

SUMMARY

Diversified Trust is a growing company, looking to add to our Memphis 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 will be working directly with the fixed income asset class leader on the oversight and management of approximately \$1 billion of separately managed tax-exempt portfolios and cash management strategies. As part of the Investment Team, contribute to the due diligence and oversight of external fixed income managers on the DTC investment platform and participate in broader asset allocation recommendations.

Primary Duties and Responsibilities:

- Proactive collaboration with lead portfolio manager to recommend policy, identify relevant market trends and communicate with associates
- Review and analysis of prospective and existing client portfolios relative to investment objectives and strategy parameters
- Trade execution, allocation, and settlement of tax-exempt bond holdings
- Administration of portfolio management tools and credit databases
- Contribute to the credit review and surveillance of bond holdings
- Handle routine and on demand inquiries from client service team
- Some travel to visit managers and other company locations

Skills/Competencies necessary for this job include:

- Bachelor's degree in Finance or equivalent education and related training
- CFA designation or intent to progress towards the designation
- 5 years of applicable fixed income experience - tax-exempt sector preferred
- Highly organized, able to work independently and within a team environment
- Excellent attention to detail with ability to multitask and meet deadlines
- Strong analytical, communication and project management skills
- Experience with InvestorTools portfolio management system is desirable
- Excellent computer skills; proficient in Microsoft Office Suite
- 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*