

FIRM SUMMARY

Diversified Trust is an employee-owned comprehensive wealth management firm based in the Southeast with over \$H 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, Charleston, Greensboro, Memphis and Nashville.

POSITION

☒☒☒

OFFICE

- ☒☒☒

SUMMARY

Diversified Trust is a growing company, looking to add to our - ☒☒☒ 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

The Portfolio Manager is responsible for acting as a fiduciary on behalf of clients and applying sound investment principles in accord with DTC's investment strategy group to create, implement and oversee portfolios to help clients achieve their defined financial goals. The Portfolio Manager partners with client service team members for portfolio management, performance reporting and client communication of investment climate

Primary Duties and Responsibilities:

- Conduct comprehensive qualitative and quantitative analysis on managers, funds and invested portfolios across all asset classes
- Analyze macroeconomic market trends and investment strategy opportunities
- Participate in investment manager meetings and investment team strategy sessions
- Create and maintain quantitative models in various statistical analysis software packages
- Handle and respond to inquiries from client service team members
- Record and organize manager return and holdings-based data
- 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 required (business, finance, economics, data analysis or related field preferred)
- CFP, CFA, CIMA or similar investment designation preferred
- 5 years portfolio management experience required
- Strong knowledge of the investment industry along with the ability to analyze, interpret and present statistics in both written and oral presentations
- Strong work ethic with a motivated and driven ownership mentality
- Ability to develop trust and build internal and external relationships in a team environment
- Ability to work under pressure and handle multiple tasks within deadlines

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