DIVERSIFIED TRUST

FIRM SUMMARY

Diversified Trust is an employee-owned comprehensive wealth management firm based in the Southeast with over $10 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

Portfolio Manager / Relationship Associate

OFFICE

Nashville

SUMMARY

Diversified Trust is a growing company, looking to add to our Nashville 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

The Portfolio Manager / Relationship Associate 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. In addition, this role serves as a member of the core client service team supporting the day-to-day service needs of both individual and institutional clients.

Primary Duties and Responsibilities

Portfolio Management:

- Cultivate and maintain client relationships with emphasis on investment strategies and asset allocation implementation
- Stay current on market environment and investment platform including manager updates and changes, as well as new and existing private investment offerings
- Partner with Relationship Manager to create, implement and document in the Investment Policy Statement (IPS) appropriate asset allocation in accordance with client needs and objectives
- Manage cash needs and rebalance current investments in client accounts
- Participate in firm-wide portfolio management team meetings, monthly investment team market calls and other investment-oriented calls and meetings

Client Service:

- Oversee activities that support the client relationship team in daily account and business practices; provide excellent client service, respond to day-to-day inquiries and assist in the research of client solutions
- Assist with the preparation of customized reports and presentations for current and prospective client meetings
- Conduct periodic reviews of client accounts, statements and reports including initial completion of annual administrative and investment reviews; ensure all required documentation is on file and accounts are properly coded
- Attend periodic client meetings; follow-up with clients and team members on outstanding client service items
- Prudent management of business risks associated with prospective new business and ongoing relationship management of existing clients

Skills/Competencies necessary for this job include:

- Bachelor’s degree required (business, finance, economics or related field preferred)
- CFP, CFA, CIMA or similar investment designation preferred
- 5 years wealth management experience required with a preference for portfolio management and direct client service experience
- 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 relationships in team environment
- Ability to work under pressure and handle multiple tasks within deadlines

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