



Are you passionate about investments? Are you results-oriented and client-focused? Then, consider working for Clearstead! We are seeking a **Portfolio Manager** in our downtown Cleveland, Ohio office who will use their financial expertise to provide comprehensive investment portfolio support to Directors and their clients.

In this position you will be responsible for 3 main areas:

Portfolio Management

- Responsible for investment portfolio construction, implementation of strategy, and proactive portfolio oversight while maintaining the Clearstead Investment Philosophy
- Creates complex investment analysis or modeling to support sophisticated investment clients
- Evaluates prospect investment data, leads the design of investment portfolio proposals, and collaborates with team members in a positive and passionate manner to win new business
- Maintains command of capital market dynamics and economic landscape, portfolio theory, market history and trends, and appreciation of individual investor behavioral traits
- Participates in Investment Research Committee
- Regularly communicates with Research Department on investment strategy

Client Service

- Attends select client meetings at the request of the Managing Director and contributes to the delivery of live investment portfolio reviews
- Communicates portfolio updates and rebalance initiatives to the Managing Director and assigned clients as needed

Operations & Administration

- Develops intermediate knowledge of clients through reading internal CRM notes, studying client files, and collaborating with team members
- Utilizes Tamarac Advisor View/Rebalancer software to analyze and manage client portfolios
- Reviews and assists in maintaining client databases and investment policy information to uphold data integrity
- Organizes and tracks client assignments to efficiently manage work-load
- Assists with audit client investment reports for accuracy and crafts impactful deliverables
- Uses internal systems to manage work efforts and communicates effectively to drive consistent and professional client experiences
- Completes other duties as assigned

The successful candidate will have:

- Bachelor's degree in Business Administration, Finance, Economics or related field; Master's degree preferred
- Advanced designation (i.e., CFA, CFP, CAIA) strongly preferred
- 3-5 years of investment and financial market experience within a financial services institution; experience within a private wealth advisory setting preferred
- Passion for investments
- Ability to work under pressure, organize and manage multiple priorities in a demanding environment where time management, attention to detail, follow-through and meeting deadlines are critical



- Demonstrated analytical skills
- Strong computer proficiency (e.g. Word, Excel, Adobe and Outlook)
- Demonstrated client service skills
- Excellent interpersonal and communication skills, written and verbal
- Strong team player with the ability to interact with staff at all levels of the organization
- Commitment to company values
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Clearstead is committed to building a culturally diverse workforce and strongly encourages applications from minorities and women.

We are an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, national origin, disability status, protected veteran status or any other characteristic protected by law.

The qualified candidate can expect:

- A flat, bureaucracy-free organizational structure that fosters creative thinking and involvement at all levels of the organization
- The opportunity to join a growing employee-owned firm that offers professional growth in an industry that is both dynamic and intellectually challenging
- An opportunity to work with high-profile private clients and institutions across the country
- A competitive base salary with an incentive bonus program
- 401(k) Savings plan with company contributions
- Health, Dental, Vision, and Long-term disability insurances
- Generous paid time off program

Interested applicants should send their resume and salary requirements to jbattes@clearstead.com.

We are Clearstead...an independent institutional and wealth advisory firm in Cleveland, Ohio.

We advise nearly 120 institutions and 500 private clients on more than \$20 billion of assets. Our institutional clients include [retirement funds](#), [endowments and foundations](#), and [healthcare organizations](#). Our private clients are families, individuals, and related entities.

Our firm was established in 1989 and is owned 100% by its professionals and Board of Directors. Our only source of revenue is fees paid by our clients for financial advice. We are not affiliated with any firm, nor do we receive revenue from any source that impairs our ability to provide objective advice.

Our independence assures our clients of top quality, objective service, in our investment, tax, estate, and financial advice. Our independence also helps us attract and retain top people.