Position Summary

At MAI, fixed income represents the “anchor to windward” of our client portfolios, which makes capital preservation the top priority in constructing bond portfolios. Our long-standing philosophy in fixed income has centered on building high quality bond ladders that maximize safety, minimize interest rate risk and satisfy unique tax considerations. The Fixed Income Portfolio Manager position in the investment group implements MAI’s fixed income strategy in the management of client assets. Their primary responsibilities include analyzing, selecting, trading, and monitoring fixed income securities and portfolios for MAI’s high net worth clients. The Fixed Income Portfolio Manager is a member of MAI’s fixed income committee, which is tasked with setting the strategic direction for fixed income portfolios. They also work closely with client portfolio managers to understand the unique goals, tax situations, restrictions, etc. for each client account so that portfolio goals are achieved.

Primary Duties and Responsibilities

- Implement and execute MAI’s fixed income strategy within the individual bond portion of MAI client portfolios
- Manage portfolios consistently across accounts while balancing unique objectives for each client
- Source, analyze, trade and monitor individual securities in the municipal, corporate, and government sectors, primarily
- Contribute to MAI’s overall fixed income strategy as a member of MAI’s fixed income committee
- Maintain Broker Dealer relationships to ensure proper coverage and best execution in fixed income

Experience and Education

- 5-10 years of experience in fixed income investing preferred
- Experience in municipal bond market preferred
- Bachelor’s Degree required; CFA designation a plus

Competencies

- Extensive knowledge of financial markets/instruments/regulations, economic theories and relationships, valuation tools, etc. particularly as it relates to fixed income investing
- Proficiency in Bloomberg, Excel, and other research/data compilation tools
- Strong organizational and time management skills to effectively manage over 100 fixed income portfolios
- Excellent communication skills and ability to work with other team members toward a common goal
- Flexibility and adaptability to a dynamic environment within a growing firm
- High level of integrity and strong ethical standards

Supervisory Responsibilities

No current supervisory responsibilities