Northwestern Mutual®

Sr. Portfolio Manager and Investment Strategist

Northwestern Mutual – Evans Financial

Company Description

You and Northwestern Mutual – Evans Financial. We believe relationships are built on trust. That our lives and our work matter. And we're much stronger together than we are apart. These beliefs launched our company nearly 160 years ago. Today, they're just a few of the reasons why people choose to build careers at Northwestern Mutual.

Our business is about helping people secure their financial futures, and that starts with putting people first – our clients and our employees. Northwestern Mutual – Evans Financial is known for financial strength. We're strong, innovative and growing. Come join us.

Job Description

At Northwestern Mutual – Evans Financial, we are empowering people to design, build and enjoy prosperous lives. We transform aspirations into actuality through acumen, hard work, discipline, and strategic financial planning.

This position has been classified as an Access Person, which will require the reporting of your personal securities transactions.

We are an equal opportunity/affirmative action employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, gender identity or expression, sexual orientation, national origin, disability, age or status as a protected veteran, or any other characteristic protected bylaw.

About the role:

This role is essential to our practice, as this person is responsible for strategically managing client portfolios, and the presentation and construction of asset allocation models. Our clientele is nationwide, centered in the medical market, and rely on our practice to achieve their financial and lifestyle goals. This person must possess the research, communication, and strategy skills to identify our client's objectives and implement solutions.

On a day to day basis, this person will monitor and manage portfolio allocations relative to investment policy. Strong qualitative and quantitative equity research and analysis skills are needed, specifically regarding the qualifications listed below. This senior manager will prepare portfolio reviews, market communications, and other materials as needed. In addition, this role will analyze performance and attributes of client portfolios.

Additionally, the Portfolio Manager will need to be able to work well in a team setting, interfacing with our Senior Wealth Management Advisor, Director of Operations, and Practice Administrator, as well as additional off-site team members in Milwaukee and Los Angeles.

Due to the integral nature of this role, we are particularly seeking a person who possesses a strong self-starter mentality, will manage portfolios with integrity, and approach challenges and deadlines with urgency.

What this role needs:

- B.S. Degree in business, finance and/or equivalent
- Series 7, Series 63 FINRA licenses required
- Certified Financial Planner (CFP) preferred
- Extensive experience with individual equity and fixed income security research and
- Significant background in understanding, interpreting and articulating asset allocation, broad economy/market conditions and metrics
- Must be able to articulate in both written and verbal form
- Demonstrated analytical and quantitative skills
- Technical expertise in applications including but not limited to: Bloomberg, Envestnet (or Tamarac), Morningstar, ERS, Excel, Word and Outlook
- Familiarity with CRM, Adobe Acrobat, DST Vision
- 5-8 years of experience in the investment/fiduciary management industry
- 5 years of equity and fixed income research, portfolio construction and client service experience

Job Type: Full-time

Salary: $70,000.00 to $80,000.00 /year