

Requisition

024490

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Job Title

Personal Investment Portfolio Manager

Location

Phoenix, AZ

Job Description

Manages a full set of fee revenue producing investment accounts ranging from moderately sized to large and sensitive personal trust and individual relationships. Operates within the framework of the underlying document, developing strategies designed to achieve specific investment goals. Assignments generally involve a high level of client servicing, in some cases as primary client contact.

Major Duties

1. Manages investment activities for a full set of fee revenue producing accounts, representing moderately sized to large and sensitive high net worth personal trusts, individual investment, and court appointed accounts.
2. Manages accounts that may require complex decision making or special handling due to the nature of the relationship, size, or type of assets managed, sensitive client issues, and coordinating shared authority with outside attorneys/consultants.
3. Develops, recommends, and directs the execution of programs designed to achieve investment objectives for accounts or family relationships. Reviews and analyzes investments to select assets and manage individual portfolios.
4. Ascertains the purpose or intentions of the trust/ agency agreement and the level of investment authority granted to the trustee/agent.
5. Analyzes and plans the overall investment strategy of the trust/agency account with continuous revision of account objectives in context of client needs.
6. Maintains extensive contact with personal trust relationship managers, clients, co-trustees, consultants, the bank's legal area and outside attorneys to ensure communication of trust/agency requirements and coordinate portfolio activity.

7. Maintains a current awareness of new investment strategies and instruments through regular contact with the investment research area and other industry professionals, as well as through personal research.
8. Participates in the development of new investment business with personal financial planning staff.
9. Ensures the completion of processing needs relative to the administration of assigned accounts.
10. Performs financial analysis on individual assets as appropriate.
11. Serves on standing investment services committee and on ad hoc unit committees as appropriate.

Knowledge & Skills

Knowledge of investment and portfolio management theory, accounting and financial principles, associated investment strategies and instruments, and characteristics of various marketplaces, usually acquired through formal education and work experience, is required to manage portfolios. Knowledge of investment terminology, the laws and regulations governing trust investments and taxation, as well as the bank's investment policies, procedures and strategies, usually acquired through work experience and formal education, is required to operate within the framework of trust documents. Decision making, sales, and negotiating skills are required to guide sensitive or difficult situations through to agreement.

Experience

3+ years of experience. CFA preferred, MBA preferred