JOB POSTING

DATE: 08/17/07

TITLE:	**Portfolio Manager**	**LOCATION:**	**Phoenix, AZ**
CATEGORY:	**Full Time/ Monday – Friday**	**REPORTS TO:**	**Investment Counselor**

SUMMARY:
Provides support to one or two Investment Counselors in managing a group of 60-80 client relationships. Often meets with clients and the Investment Counselor for quarterly investment reviews and other meetings called for by the client. May provide advice relating to estate planning, tax, and insurance issues.

Assures compliance with all company policies and procedures, as well as, all applicable state and federal regulations.

TO QUALIFY YOU MUST HAVE:
These specifications are general guidelines based on the minimum experience normally considered essential to the satisfactory performance of this position. The requirements listed below are representative of the knowledge, skill and/or ability required to perform the position in a **satisfactory** manner. Individual abilities may result in some deviation from these guidelines.

- Bachelors Degree Degree from an accredited college or university; and 1 – 3 or more years of related experience and/or training; or the equivalent combination of education and experience. Work related experience requires basic to intermediate knowledge of investor operations, generally accepted accounting principles, and regulatory and related tax laws. Educational experience, through in-house training sessions, formal school or financial industry related curriculum, should be applicable to the financial industry.
- CFP, MBA, or CFA certification preferred. Series 65 preferred and may be required within 3 months of hire. Typically is new to the investment business or has less than 3 years of experience.
- Portfolio construction using advanced software concepts
- Processing client requests (liquidations, transfers, etc.).
- Implements & participates in developing investment strategies set by the Investment Counselor.
- Re-balancing of client accounts.
- Applies tax management techniques such as loss-harvesting, tax-lot selling, fund strategies, etc.
- Organizes data from client for meetings and development of investment strategies.
- Replaces funds/mangers at the direction of the Investment Counselor or IPC.
- Reviews reports and client specific data for accuracy.
- Special projects as directed by the Investment Counselor.
- Will handle clients on all matters in the absence of the Investment Counselor.

If interested, please send a resume to bmoss@miller-russell.com.

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