



*Our people are our competitive advantage.*

At Butterfield, we pride ourselves on being approachable, disciplined and proactive. If you embody these qualities and have the necessary experience, you may be the one we're looking for.

## **Vice President, Senior Portfolio Manager & Head of Private Client Team, Bermuda**

### **Butterfield Asset Management (Bermuda) Limited**

This position reports to the Executive Vice President, Head of Group Asset Management and is responsible for managing and overseeing all existing private client portfolios and all other aspects of client relationship management. The incumbent will also be responsible for developing new High Net Worth (HNW), Corporate, Charity or Foundation business from existing clients, new clients and referral sources. Participate in various investment committees. May head the investment decision process leading to strategy decisions and implementation.

#### **Your responsibilities will include:**

- providing investment advice across a full range of investments and asset classes (including equities, fixed income and various alternative investment classes), assisting clients in developing investment policy statements by conducting asset allocation reviews and developing optimal portfolio structures
- acting as the spokesperson on investment strategy and process, keeping clients up-to-date on market trends, house views, opportunities and their potential impact on portfolios
- ensuring portfolios are constructed and managed in accordance with clients' investment goals and the firm's strategy by conducting portfolio and security monitoring and directing portfolio changes or rebalancing
- providing proactive, effective and timely resolution of all client issues by handling daily client needs and requests. Reviewing, analysing and presenting quarterly investment reviews to clients in addition to conducting regular face-to-face meetings
- conducting ongoing analysis and research on financial markets, individual securities and investment products with a primary focus on public equities
- working with senior management to facilitate key product launches, business development initiatives and meeting investment revenue targets, which require preparation of pitches for meetings, carrying out presentations with prospects, preparing mandate offers and lead negotiations to close of deal
- training, developing and overseeing the work of Portfolio Managers and Portfolio Administrators and interface as needed with other support personnel including Treasury, Accounting, Trading and Administration

#### **Your experience may include:**

- Bachelor's degree and a CFA designation with a minimum of 10 years relevant industry experience
- Chartered Alternative Investment Analyst (CAIA) designation preferred
- track record of success in advising and managing multi-asset class portfolios across a broad array of wealth management clients within agreed parameters, restrictions and regulatory frameworks
- highly developed presentation and facilitation skills with demonstrated ability to grow a book of assets. Confidence in dealing with clients with diverse investment knowledge, needs and characteristics
- hands-on experience in researching and analysing global financial markets and macro economics, with very strong knowledge of various asset classes (particularly public equities), financial instruments, asset allocation and portfolio construction techniques
- ability to effectively communicate with internal investment/research personnel on markets, economics, asset classes and individual securities in the development of investment strategies, models and investment solutions for the Group
- prior managerial responsibilities with a strong entrepreneurial spirit, drive and ambition to excel in a team environment
- familiarity with market information and technical systems like Microsoft Word, PowerPoint, Excel, Bloomberg and Portia

Please apply by 26 March 2012 to:  
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**Butterfield**

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