

Careers, by BUTTERFIELD.



Take a step in the right direction.

At Butterfield, we provide full-service community banking and specialised international financial services. Operating in multiple jurisdictions, we focus on results, value relationships, and celebrate success. If this sounds like your kind of company, then consider this opportunity to become part of a collaborative team of professionals at a world-leading, independent offshore bank and trust company.

Senior Portfolio Manager

This position reports to the Head of Group Asset Management and is responsible managing trust, corporate and high net worth client account assets and investment relationships consistent with the established investment objectives and strategies of the company and/or client. The incumbent will be involved in a high level of client servicing regular proactive client outreach, in some cases as primary client contact, as well as participation in the sales process..

Your responsibilities will include:

- Structuring, optimizing and managing client portfolios by assessing risk profiles and establishing investment policies
- Implementing asset allocation within the framework of the client investment policy and Global Investment Committee.
- Constructing portfolios by selecting the appropriate financial instruments based on the Group's approved security list and financial models in conjunction with client risk profiles
- Ensuring the completion of processing needs relative to the administration of assigned accounts
- Maintaining deep expertise in financial markets and other related areas
- Performing financial analysis on individual assets as appropriate
- Overseeing and managing the Private Equity offering and alternative investment products.
- Participating in the development of new investment business by discussing and presenting investment services capabilities for private and institutional prospects.
- Assisting in the Group's strategy planning and development of the local investment offering.
- Overseeing ARC relationship and quarterly reporting of performance data.

Your qualifications and skills include:

- Minimum of ten years investment experience, in which consistent long term investment performance has met objectives; CFA designation required
- Prior experience as a Portfolio Manager/Investment research analyst with knowledge of Investments/Portfolio management theory, investment strategies and application thereof
- Strong accounting and financing background with application to investments and financial instruments
- Advanced expertise in managing client assets across asset classes and entity type
- Strong working knowledge of Bloomberg in particular using Bloomberg API
- Previous experience with Portia and Reuters an advantage
- Excellent communication, client servicing and business development skills required along with attention to detail
- Proficient in Microsoft Office Suite

About the team

The Asset Management team helps our clients to grow, manage and preserve their wealth through a selection of investment products, management services and brokerage options. We work with clients to develop investment strategies and construct tailored portfolios to meet their investment objectives, risk attitude and liquidity requirements. Our clients include individuals, charities, pension plans, trusts, institutions and insurance entities.

Why Butterfield?

The Butterfield experience is enhanced by robust learning and development opportunities, comprehensive benefits, and preferred rates on a variety of proprietary financial services. Guided by our core values—approachable, collaborative, empowered and impactful—we provide a respectful environment where the diversity of our employees and the talents and experiences they bring are celebrated and valued. With a 160-year tradition of service excellence, we empower individuals to achieve their goals and make a positive impact on our business, our clients and our communities.

Does this sound like you?

All applications should be forwarded via e-mail to resumes@butterfieldgroup.com.

Closing date:

Wednesday, 8 April, 2021

Let's start a conversation.



butterfieldgroup.com

