

Careers, by BUTTERFIELD.



Take a step in the right direction.

At Butterfield, we provide financial services with a personal touch, we focus on results, we value relationships, and we celebrate success. If that sounds like your kind of company, then consider this opportunity to become part of a collaborative team of professionals at the world's leading, independent offshore bank and trust company.

Senior Portfolio Manager

This position reports to the Head of Asset Management Bermuda and is responsible for managing trust, corporate and high-net worth client portfolios and investment relationships consistent with the established investments objectives and risk requirements of the respective mandate. This position will involve a high level of client servicing, regular proactive client outreach, in some cases as primary client contact, as well as working with relationship manager in the sales process.

Your responsibilities will include:

- Structuring, optimising and managing client portfolios designed to achieve specific investment goals 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
- Performing financial and security analysis for our segregated equity model portfolio
- Ensuring the completion or processing needs relative to the administration of assigned accounts
- Maintaining deep expertise in financial markets and other related areas while also participating in or contributing to various investment committees
- Participating in the development of new investment business with Private and Corporate banking professionals by discussing and presenting investment services capabilities for private as well as institutional prospects
- Assisting in the Group's strategy planning and development of the local investment offering

Your qualifications and skills include:

- A minimum of 10 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 finance background with application to investments and financial instruments
- Strong security analysis skills with demonstrable performance record
- 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.
- Advanced knowledge 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:

Thursday, 18 August 2022

Let's start a conversation.



butterfieldgroup.com

