

**PORTFOLIO MANAGER / INVESTMENT OPERATIONS**

SEIA is a wealth management firm located in Century City, CA. We provide an extraordinarily high level of investment and wealth management support to a large and affluent group of clients. We are seeking an experienced individual to serve as an integral part of the Investment Operations department.

**Primary Responsibilities:** Manage and maintain client portfolios within our \$2 billion discretionary investment platform which includes but is not limited to the following;

- ◆ Act as liaison between the investment department (CIO, IC, Analysts, Portfolio Managers) and numerous ultra-high net worth individuals, foundations, and financial planning practices nationwide
- ◆ Prepare various reports to assist Chief Investment Officer (CIO) and the Investment Committee (IC)
- ◆ Depending on experience, additional duties will be considered including handling media requests, originate research and dissemination, Investment Committee presentations and possible IC membership, etc.
- ◆ Organize, analyze, and reconcile portfolio data using Tamarac Advisor Rebalancing tools as well as other proprietary software
- ◆ Recommend and implement trade orders across the entire breadth of the investment universe including individual securities (stocks, bonds), commingled funds (exchange-traded, mutual funds, closed-end) and alternatives.
- ◆ Work collaboratively with team members on portfolio trading, new account onboarding, portfolio reconciliation, and other general investment research projects

**Qualifications:**

- ◆ 7+ years of experience in an investment, financial planning, or wealth management firm (other mathematical/technical experience may be considered as a substitute to financial services work requirement)
- ◆ CFA or similar industry designations
- ◆ Exceptional organization and follow-through skills

**We Offer:**

- ◆ Base salary, plus incentive compensation, and comprehensive benefits
- ◆ Great work-life balance
- ◆ Ability to create, improve & take ownership