



## VP, Investment Manager

Reporting to the Head of Investment Strategy, the Vice President, Investment Manager is responsible for the development and execution of investment strategies for Ultra high-net-worth, high-net-worth, and family office clients within the discretionary wealth management department. This individual will have a broad and deep understanding of sophisticated wealth management practices and investment strategies. This senior role includes being a key member of the Investment Committee, contributing to its investment decision making process, and other investment related support functions necessary for the management of client portfolios. In addition to asset management, the incumbent is responsible for the provision of technical sales support to the wider Wealth Management business.

### Primary Responsibilities:

- Direct responsibility for the day to day management of Private Client Discretionary portfolios working closely with clients in order to meet their financial objectives. This includes formulation of the IPS, establishing appropriate investment strategies, implementation, rebalancing, execution of strategy changes and performance monitoring.
- Demonstrates a comprehensive understanding of economics and the financial markets with the ability to explain complex issues to clients and colleagues in either a one-on-one situation or a group presentation.
- Contributes to the fundamental research process of new equity, fixed income and alternative investment opportunities.
- Member of the Investment Committee, contributing to both strategic and tactical asset allocation positioning. Contributes to qualitative and quantitative modeling of key asset allocation decisions and the development of model inputs. Works closely with the research team and Investment Committee ensuring implementation of strategies at the individual portfolio level.
- In-depth knowledgeable of Wealth Management solutions and products with an ability to discuss and provide cross-sell technical sales support throughout the Bank.
- Supports Relationship Managers in meetings with clients and prepares proposals or updates for client presentations.

- Assists in the development of client communications and preparation of quarterly reporting.
- Understands the regulatory obligations as set forth by the BMA in regards to KYC and AML. Understands and executes the business' policies and procedures in regards to KYC and AML, in addition to the business-wide policy framework.

### The successful candidate must have:

- University degree plus 10 years relevant work experience or equivalent
- A strong basis in economics, finance and accounting
- CFA charter holder
- Strong analytical skills, good organizational and administrative capabilities, and excellent oral and written communication skills
- Experience working with Ultra high-net-worth, high-net-worth, and family office clients
- Thorough understanding of the financial markets
- Demonstrated ability to establish positive relationships and inspire trust in others
- Be able to work with minimum supervision and be highly motivated
- Working knowledge of Bloomberg would be an asset
- Proficient in Microsoft Office suite of applications, excel spreadsheet skills essential.

Clarien is an equal opportunity employer and offers a competitive compensation package commensurate with qualifications and experience.

Please submit a detailed cover letter and résumé no later than January 20<sup>th</sup>, 2021 to:

**Human Resources Department**  
**19 Reid Street, Hamilton HM 11**  
**P.O. Box HM 665, Hamilton HM CX**  
**Email:** jobs@clarienbank.com  
**Fax:** + 441 296 7701

www.clarienbank.com | 441 296 6969

Head Office: 19 Reid Street, Hamilton HM11, Bermuda | Paget Plaza: 161 South Road, Paget DV04, Bermuda

We sincerely thank all applicants for their interest. Only those candidates under consideration will be contacted.

Clarien Bank Limited through its wholly owned subsidiary companies is licensed to conduct bank, investments and trust business by the Bermuda Monetary Authority.