|  |
| --- |
| **Assistant Portfolio Manager** |
| *(full-time, regular employment)* |

**A picture containing text

Description automatically generated**

**About AdvisorNet Financial**

AdvisorNet Financial has been an innovative leader in the financial services industry for over 60 years. We provide the services and support independent financial advisors rely on to operate their firms efficiently and competitively. Over the years we've developed a vast network which allows us to provide our 300+ independent advisors access to the support services and industry partners that advisors in large institutions enjoy without having to be part of a large institution. For more information, please visit us at [www.advisornet.com](http://www.advisornet.com).

You will be a great fit if you enjoy working with people and data in a very dynamic, fast-paced environment. Our group requires people to be friendly, outgoing, and to thrive in an environment working on and in the business at the same time.

**Responsibilities**

***Overview:***

The Assistant Portfolio Manager will be responsible for actively managing client portfolios and model strategies using individual securities, ETFs or mutual funds. In addition, the PM will also be required to write articles/newsletters as well as lead conference calls, podcasts and webcasts for firm promotion and business development.

**Key Areas of Responsibilities:**

* Construct successful investment portfolios informed by market conditions and economic trends
* Buy and sell securities in client accounts to maintain a specific investment strategy
* Develop, test and implement investment strategies
* Evaluate the performance of investment portfolios and ensure compliance with standards provided by regulatory organizations
* Support client and advisor meetings by communicating economic updates and portfolio positioning
* Evaluate market and economic conditions and apply relevant trends to investment portfolios
* Promote market and economic updates and trends through articles, conference calls and podcasts for brand awareness

**Qualifications**

* Series 7 and 66 securities licensing
* Professional certification as a Certified Investment Management Analyst (CIMA), Chartered Market Technician (CMT), or CFA (Chartered Financial Analyst)
* Ability to work in fast paced team environment
* High interest in and enthusiastic about economic and financial market trends
* Demonstrated knowledge of capital markets, economic trends and forecasting, investment strategies and risk management
* Strong analytical and problem-solving skills
* Proficiency with Microsoft product suite with advanced skills in Excel
* Proficiency with trading platforms and software, experience with Tamarac Rebalancing preferred
* Bachelor’s degree and 8+ years of experience in the investment advisory industry

To apply, please visit the LinkedIn Posting [Make the Linkedin Posting a hyperlink directly to the page]

<https://www.linkedin.com/talent/hire/552801548/job-post>

*Disclaimer: This job description is only a summary of the typical functions of the job, not an exhaustive or comprehensive list of all possible job responsibilities, tasks, and duties. Responsibilities, tasks, and duties of the jobholder might differ from those outlined in the job description and other duties, as assigned, might be required.*