



Borel Private Bank & Trust Company®

A Division of Boston Private Bank & Trust Company

JOB DESCRIPTION

Business Area: **Investment Management & Trust**

Functional Title: **Portfolio Manager – San Mateo, CA**

Position Summary:

The Portfolio Manager will have primary responsibility for providing investment services to San Mateo relationships, including defining implementation of Boston Private investment policies and strategies, and maintenance of information systems critical to the investment process. This position will head San Mateo Investment Committee; plan work flow assignments, and interact with client relationships focused on investment management. This will involve participation in business development efforts, defining client objectives and goals; establishing, implementing and enforcing appropriate investment policies and maintaining ongoing communications with clients regarding investment strategy and performance.

Roles and Responsibilities:

- I. Relationship Management:
 - a. Participate in the development of new client relationships in collaboration with the Business Development Officers.
 - b. Work with new and existing clients in defining their goals and objectives and selecting the appropriate investment strategies to fulfill their requirements.
 - c. Manage and administer accounts in accordance with client requirements and internal Borel policies and guidelines, including performing annual reviews.
 - d. Implement selected investment strategies, including working with outside managers and initiating trading as required.
 - e. Maintain ongoing relationships with clients to ensure client investment policies and strategies remain appropriate and that strategies and account performance are accurately communicated.

- II. Investment Process:
 - a. Direct investment policy adherence, including the evaluation of outside managers, investment research and the analysis of trends in financial markets and the economy.
 - b. Manage the development of client communication materials and proposals.
 - c. Responsible for management information systems used in the investment process and the generation of reports utilized in the management of investment portfolios.

Qualifications:

- Knowledge of equity and fixed income investment concepts and strategies
- Experience with trading, including fixed income securities
- 10 plus years of experience in an investment organization, including client relationship management
- Strong computer skills including Microsoft Office applications
- Four-year college degree required
- CFA designation

All Boston Private Bank & Trust Company employees are expected to adhere to the following competencies:

Core Competencies:

- **Client Focus** - Dedicated to meeting the needs of internal and external clients; listens effectively and establishes and maintains relationships and gains client's trust and respect.
- **Ethics, Integrity and Trust** - Considers ethical issues before decisions are made and seeks to achieve results that are in the best interest of the Bank.
- **Ownership, Accountability, Responsibility and Compliance** - Takes ownership of tasks, projects, and relationships and follows through on obligations and promises.
- **Self Development and Learning** - Personally committed to learning and actively works to continuously develop professionally.
- **Teamwork and Collaboration** - Works collaboratively; finds common ground and solves problems for the good of all and can represent his/her own interests and yet be fair to the team.

Individual Contributor Competencies:

- **Decision Making and Problem Solving** - Makes decisions in a timely manner, uses a mixture of analysis, experience and judgment to solve difficult problems with effective solutions.
- **Informing and Communicating** - Proactively communicates information to colleagues up, down and across the organization, provides updates on projects, tasks and potential roadblocks.
- **Planning** - Accurately scopes out length and difficulty of tasks and projects and sets objectives and goals
- **Time Management** - Uses his/her time effectively and efficiently; values time; concentrates his/her efforts on important priorities and completes tasks and/or projects on time.