Guaranty Bank
Job Description

TITLE: Senior Vice President**,** Portfolio Manager **REPORTS TO:** President

DEPARTMENT: Wealth Management &Trust Services **LOCATION**: Springfield

JOB SUMMARY:

Guaranty Bank is seeking a Portfolio Manager to play a key role in managing individual and trust account assets and investment relationships. These assets will be managed consistent with the established investment objectives and strategies of the Investment Department and/or clients. This position includes a strong focus on supporting client account retention to meet the growth objectives of the company as well as a shared responsibility for supporting the development and management of client relationships for the Wealth Management and Trust Services Department.

ESSENTIAL FUNCTIONS:

1. Manage assigned client accounts in keeping with governing instrument, the needs of the clients and/or beneficiaries.
2. Plan and analyze investment strategies.
3. Prepare and present clients' reports as needed. Deliver clear presentations on the markets, client investment products, process, strategy, performance, and outlook.
4. Extensive contact with personal trust relationship managers and officers, clients, co-trustees, attorneys, etc., to ensure coordination of account and trust requirements.
5. Proactively participate in efforts to strengthen existing relationships and identify new business opportunities. Assist administrative and business development personnel in the preparation of RFP's and presentations to clients and/or prospective clients.
6. Actively participate as a member of the Trust Investment Committees.
7. Assist as necessary with trade activity for fixed income, equity, and mutual fund securities for portfolios managed by the Trust Department.
8. Perform additional duties as assigned and/or capacity allows.

QUALIFICATIONS:

1. Ten to fifteen years of experience providing financial services expertise, management, and business development in financial services, preferably in a wealth management and/or trust field.

2. Discretionary portfolio management experience.

3. Strong knowledge of finance, economics, and general business

4. Credible presenter, able to deliver compelling and concise investment presentations leading to increased business and retention. Self-starter able to operate in a highly team-oriented and collaborative environment.

5. Bachelors degree in accounting, finance, math or other related field, or equivalent working experience preferred. CFA or CFA candidate a plus.

6. Ability to manage a variety of tasks and work independently.