Portfolio Manager
(Cincinnati, OH)

As Madison continues to grow, we are looking to expand our Portfolio Management team with professionals dedicated to their craft that embody the highest standards of teamwork and client service.

Madison Wealth Management is a trusted, independent financial planning and investment management firm founded in 2000 with approximately 350 client relationships and nearly $1.3 billion in assets under management. With offices in Cincinnati and Washington, D.C., Madison's professionals provide objective, high-quality advice to help successful people and organizations build and maintain their wealth.

JOB DESCRIPTION:

Madison is seeking an experienced Portfolio Manager to manage client investment portfolios and support the firm's Wealth Advisors in engaging clients and attracting new relationships to the firm. To this end, the candidate will assist in the development of client investment reviews and new business presentations. The Portfolio Manager plays a significant role in supporting the portfolio management team in the areas of due diligence, monitoring and analysis, rebalancing, as well as trading to ensure clients maintain an appropriate asset allocation. Above all, the Portfolio Manager must demonstrate the highest ethical standards, a commitment to extraordinary teamwork and client service, and a dedication to professional excellence through continuing education and professional development in the world of investments.

DUTIES AND RESPONSIBILITIES:

- Collaborate with wealth advisors to provide customized portfolio management services to clients
- Construct and monitor investment portfolios based on client needs, objectives and risk tolerance
- Support wealth advisors in communicating with clients through in-person meetings, phone calls and email
- Serve on the investment committee and contribute to decision making at the security, asset class & portfolio level
- Perform investment analysis for the firm's equity, fixed income and alternative investment portfolios
- Assist with research and management of Madison's U.S. Large Cap Equity strategy
- Assist with maintaining data on investment vehicles and benchmarks
- Trading in client accounts

Qualifications and Skills:

- 4-year undergraduate degree or higher
- CFA designation or interest in pursuing
- Minimum 3 - 5 years of relevant experience preferred, preferably with a focus on investment management, investment consulting or buy-side experience
- Highly developed communication skills (written, verbal, listening and presentation)
- Working knowledge of Excel, Tamarac, FactSet and other investment related software
- Possess active listening and critical thinking skills
- Desire/ability to work successfully in an intimate, fast-growing, entrepreneurial company

Please forward cover letter and resume to HR@madisonadvisors.com

Madison Wealth Management is an Equal Opportunity Employer. We do not discriminate on the basis of race, religion, color, sex, gender identity, sexual orientation, age, non-disqualifying physical or mental disability, national origin, veteran status or any other basis covered by appropriate law.