

Job Title:
Portfolio Manager

Location:
Carlsbad, CA

Company Description:
Headquartered in Pasadena and in business over 40 years, our client is an independent investment counseling firm that provides advice to individuals, families, charitable entities, and foundations.

Responsibilities:
There is an immediate need for an experienced Portfolio Manager with a portable book of business in our Carlsbad office. In this role, you will manage individual common stocks, fixed income, and other conservative investments for individuals investing over 200K with the firm. This role will also be responsible for developing business by delivering presentations to prospective clients referred to the firm.

Requirements:
We are seeking a polished investment professional, comfortable in investments, and comfortable dealing with a variety of individual investors and making presentations to potential investors. This is a unique long-term opportunity, with the potential for equity in the firm.

Contact Info:

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