

Fairport Wealth Portfolio Manager Position Description

FUNCTION

As a member of the Fairport Investment Team with \$3B+ in discretionary assets under management, the Portfolio Manager is integral to the analysis of equities, exchange traded funds (ETFs), mutual funds and alternative investments; management of client accounts, and meeting with clients regarding the investment process. The Portfolio Manager will also have ongoing investment and research responsibilities across various asset classes including equity, fixed income, and alternative asset classes.

The position reports to the Chief Investment Officer.

DUTIES & RESPONSIBILITIES

1. Key contributor to equity research and analysis, including projects relevant to global institutional portfolios and special projects on existing and new investments.
2. Assist in managing our proprietary large cap model.
3. Manage investment model design and implementation.
4. Serve as member of the Fairport Investment Committee.
5. Represent the Investment team in client and prospect meetings along with Client Relationship staff.
6. Modeling, analysis and research related to financial market coverage, investment manager coverage and macroeconomic landscape.
7. Lead the ESG investment platform offering.
8. Review the suitability of alternative investment offerings.
9. Proactively reviews investment portfolios for assigned clients. Develop and implement transition investment plans for investing new cash and/or raising cash.
10. Contribute investment analysis regarding markets, industries and companies, and stay current with domestic and global economies.

QUALIFICATIONS & ATTRIBUTES

1. Require a 4-year college degree; Finance, Economics or Accounting a plus.
2. CFA preferred, or at a minimum completed Level II.
3. CAIA designation a plus.
4. 5 - 10 years' of investment experience as research analyst, fund manager, or portfolio manager.
5. Working knowledge of portfolio accounting and performance calculations.
6. Thorough understanding of asset classes and benchmarking.
7. Proficiency with Bloomberg, Morningstar, Thomson Reuters Eikon.
8. Excellent communication and interpersonal skills.
9. High degree of attention to detail, with ability to work independently.