CASTLEPOINT
WEALTH ADVISORS

Portfolio Manager

Castlepoint Wealth Advisors is one of the leading wealth management firms in the Southwest and has become a career destination for talented professionals. Our unique work culture promotes teamwork, professional growth and an engaging environment.

Our core purpose is to build happier and more prosperous lives. We believe a healthy work/life balance is essential – happy team members provide the best possible service to our clients.

We are hiring a Portfolio Manager to join our talented team to help us continue to deliver great value to clients.

Duties and Responsibilities

The Portfolio Manager plays an integral part of our investment team and helps advisors focus on investment and financial planning strategies. This person effectively communicates strategies to team members, clients and prospects. We are looking for someone who works well in a team and fast-paced environment who is committed to providing superior client service.

Portfolio Manager responsibilities include but are not limited to:

- Proactively managing client portfolios for accurate implementation, executing rebalancing activities and tax-loss harvesting in conjunction with client cash flow needs.
- Writing and providing client commentary on markets.
- Collaborating with the advisory team to manage client portfolios, prepare investment policy statements and provide research on investment products.
- Coordination of investment committee meetings.
- Analysis and comprehension of investment options, both public and private investments.
- Strong understanding of asset allocation, and the role of equities, fixed income, and alternative assets to a private investor.

We will hire the person who best embodies and embraces the Castlepoint Core Values:

+ **Lifelong Learning**
  Maintain a beginner's mind and develop the necessary skills and expertise to excel in our profession.
+ **Serve with Excellence**
  Honor others by exceeding expectations.
+ **Have Fun!**
  A fun and flexible workplace allows us to pursue happiness in our own lives.
+ **Seek Simplicity**
  Reduce complexity so we can focus on what matters most for clients.
+ **Team-Minded**
  When we move forward together, success takes care of itself.
+ **Lead with Integrity**
  Lead by example and always do the right thing.

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Qualifications

We would strongly prefer these qualifications in this Portfolio Manager position:

- CFA or CIMA certification
- Proven analytic and problem solving skills
- 3+ years of experience in a related field

What we offer:

- Competitive salary based on experience and skills.
- Performance-based bonus, team and individual.
- Paid time off.
- Health care, dental, and company retirement plan.
- Opportunities for professional growth and continuing education.

How to Apply →

Interested applicants should send their resumes with a cover letter to **Drew@castlepointadvisors.com**. We will contact you if we believe your qualifications meet our needs. Thank you!

Castlepoint Wealth Advisors is an Equal Opportunity Employer

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9112 N. KELLEY AVENUE SUITE B2
OKLAHOMA CITY, OK 73131
405-705-2906

CASTLEPOINTWEALTH.COM