CLIFFORD SWAN
INVESTMENT COUNSELORS

Investment Counselor/Portfolio Manager
Clifford Swan Investment Counselors
Pasadena, California

Firm Overview

Clifford Swan Investment Counselors is an independent, 100% employee-owned registered investment adviser serving high net worth individuals, families, and not-for-profit organizations. With over $3.7 billion in assets under management and approximately 750 high net worth and institutional clients, Clifford Swan is committed to providing objective investment management and financial advice with personalized, responsive client service. Our longstanding success as a firm is rooted in our values, which prioritize putting our clients first and adhering to the highest ethical standards.

Position Overview

Investment Counselors work within a collaborative culture of experienced investment professionals and client service specialists to deliver wealth management services to Clifford Swan clients. As Investment Counselors, we are committed to a fiduciary standard of care in providing objective, professional investment advice and portfolio management to our clients.

Job Responsibilities

The scope of work includes:

- Develop and implement wealth management strategies to achieve clients' financial goals
- Develop asset allocation strategies to meet client objectives; implement investment plans
- Implement portfolio management strategies utilizing individual equity and fixed income securities approved by the Clifford Swan Investment Committee
- Identify investment trends, review and organize data, synthesize information, interpret company and industry data to support investment strategies that meet client objectives
- Gather and analyze historical and current capital market data to prepare exhibits and other client presentation materials
- Invest accounts, review and apply client guidelines, monitor cash flow, address client requests
- Work on special projects in support of client investment and financial planning objectives

Qualifications

- Demonstrated interest in investments and capital markets, fulfilled by some, or all, of the following:
    - Bachelor's degree in a related subject area with a record of high academic achievement
    - Knowledge/experience in investment management (e.g., RIA, bank, or trust company)
    - CFP, CFA or MBA preferred
- Strong quantitative, analytical, and communication skills
- Proficiency in Bloomberg, Thomson Reuters Eikon, RedBlack and Orion Advisor Services desirable; strong technology skills required
- Demonstrated ability to work both independently and collaboratively as part of a team
- Ability to assign priorities to multiple concurrent, competing requests while ensuring accuracy, completeness, and timeliness
- Candidates must be eligible to work in the United States without sponsorship or restrictions

All applications must include a resume and cover letter. Please send this information to Gretchen Lee via email at GLee@cliffordswan.com.