Client Portfolio Manager

Position Description

As a Client Portfolio Manager, you will work closely with our Investment Team, focusing on managing client relationships, managing and rebalancing client portfolios and generating new business.

Why work with us?

- Maple Capital is a fast-growing Registered Investment Advisor that is professional and engaging
- You will work with a team of enthusiastic, hard-working and service-oriented people who are dedicated to continuous improvement

Duties and Responsibilities:

The Client Portfolio Manager will be responsible for a wide variety of portfolio management duties including:

- relationship management,
- rebalancing portfolios,
- business development; and
- special projects as needed

Candidate will work with existing client base as well as market to prospective clients in the high net worth, institutional and captive insurance spaces.

Our next Client Portfolio Manager has:

- A team player with a great sense of humor
- A propensity to follow through and ensure that tasks have been completed in a timely manner
- The ability to handle competing priorities with grace and composure
- A proclivity to serve clients
- Strong written and verbal communication skills and is comfortable interacting with colleagues, and clients
- 3 years of financial services industry experience
- A Bachelor's Degree from an accredited college or university
- A CFA or CFP designation (preferred)

In this position you are probably NOT someone who:

- Prefers work to flow to you smoothly
- Struggles working with different or conflicting personalities
- Gets easily distracted
- Is uncomfortable sharing mistakes

What's in it for you?

- Pay/benefits are competitive based on industry standards.
- Competitive salary will be based on experience – *not a commission-based position*
- Benefits include health care and 401(k)

If interested in the position, please send resume, cover letter and salary requirements.

Maple Capital Management, Inc. is an Equal Opportunity Employer.