Position Title: Investment Strategist/ Portfolio Manager

About Our Firm: Legacy Advisors, LLC is a premier Wealth Management firm headquartered in Plymouth Meeting, PA. We are a well-established and growing RIA with expertise in investment and wealth planning for ultra-high-net-worth ($25M+) individuals and business owners. As an independent, fee-based firm, we are committed to helping our clients achieve peace of mind by serving them with the highest level of integrity and ensuring that their business and personal affairs are always in order. The common trait they share is too little time to take care of the strategic and tactical planning needed to secure their financial objectives.

Position Summary: This position is responsible for building and analyzing client portfolios as well as conducting manager due diligence and monitoring investment manager performance. The PM will also provide support to the Chief Investment Strategist (CIS) and Legacy Client Advisors in providing support for new business development initiatives (from an investment perspective) and contributing to the ISM's overarching manager research and asset allocation activities. You will play an integral part in ensuring our clients' assets are always aligned with their personal objectives.

Position Responsibilities:

- Work closely with Client Advisors to achieve our client's wealth management goals and objectives.
- Investment research and due diligence
    - Participate in ongoing manager/market/economic research.
    - Take ownership of manager oversight.
    - Participate in manager change and strategic/tactical portfolio shift decision making process.
    - Develop ideas, source, and conduct due diligence on new strategies/managers.
    - Assist with manager performance reports, manager commentary, and market commentary.
- Attend client interactions to communicate insights into current events at the macro and investment specific level.
- Analysis and assessment of prospect portfolios.
- Collaborate and work closely with internal staff in making investment decisions based on the application of financial, economic, and statistical data.
- Prepare, develop, and review materials pertinent for ongoing portfolio analysis.
- Analyze and evaluate client performance reports.

Background Requirements/Preferences:

- 5+ years of experience in investment management industry with clients that are primarily institutions, corporations and/or high-net-worth individuals.
- CFA or industry licensing preferred
- Manager due diligence experience both traditional, and, ideally, alternatives (e.g hedge funds, private equity, venture capital, private real estate) preferred.
- Experience with developing investment strategy, asset allocation and portfolio construction.
- BA or BS degree in business, accounting, finance, or economics.
- Proficiency in Word, Excel, Outlook and experience having worked in portfolio management/rebalancing (e.g. RedBlack, Addepar, Tamarac) as well as performance reporting software (e.g. Black Diamond, Orion, Investment)
- Detail-oriented, accurate, organized, able to set priorities and work independently.
- Strong written and verbal communication skills.
- Self-starter, ability to take initiative.
- Team player, collaborative, able to work with and through others.
- Desire/ability to work successfully in an entrepreneurial sales environment.
- High degree of personal integrity.
- Ability to work with interactive software to support daily functions.
- Adheres to and promotes our Firm culture and values.

Contact Information: Legacy Recruiting @ **LegacyRecruiting@legacyadvice.com**; Firm website: **www.legacyadvice.com**.