

## **Fiduciary Investment Manager**

### **JOB BRIEF**

ClearPoint Federal Bank & Trust (ClearPoint) is looking for an individual to provide investment oversight and advisory services to its trust customers. This position will be responsible for providing recommendations and monitoring of current customer investments, participating in client meetings regarding investments and provide training and periodic investment related materials for other ClearPoint employees and customers.

### **RESPONSIBILITIES:**

- Continual monitoring of approved mutual fund list for changes in managers, styles, AUM, etc.
- Monitor watch list of approved mutual funds and make recommendations for appropriate actions to be discussed with clients
- Periodically review standard allocation models for strategy or fund changes
- Participate in regular Trust and Fiduciary Committee meetings as needed to advise committees on current invest options
- Participate in and prepare materials for regular and ad-hoc customer visits to provide investment updates and general market overviews
- Meet with prospective clients to discuss ClearPoint investment offerings
- Complete annual investment reviews for accounts where ClearPoint has investment discretion
- Provide investment talking points and market overview to Trust Administration staff for use when talking with clients
- Monitor outside investment managers from initial due diligence to on-going reviews
- Establish standard documents to be used when engaging outside managers
- Review investment performance of outside investment managers and participate in manager meetings to represent ClearPoint's fiduciary interests

### **REQUIREMENTS:**

- ❑ Four year college degree in finance, business management or related field.
- ❑ Five years' experience in investment management or advisory services; experience with mutual funds a plus.
- ❑ One to three years' experience in a trust department or related experience is a plus, but not required.
- ❑ Experience working with a variety of clients in terms of investment expertise, risk tolerance and asset size.
- ❑ Demonstrated problem solving, decision making and communication skills, both written and spoken.
- ❑ Ability to work independently.
- ❑ Continuous improvement mindset. Must take initiative to address issues proactively.
- ❑ Ability to coordinate and complete multiple tasks in a timely and efficient manner.
- ❑ Knowledge of preneed funeral and cemetery trusts is a plus, but not a requirement.