Vice President, Investment Management

Job Brief

At ClearPoint Federal Bank & Trust (ClearPoint), you are given the opportunity to do meaningful work aligned to your strengths, in an environment where you have a voice and are able to collaborate with others, and ultimately have the chance to create your own career path. ClearPoint is looking for an individual to provide investment oversight for ClearPoint's bank and fiduciary assets as well as advisory services to its trust customers. This position will be responsible for providing recommendations and monitoring of current investments, participating in management, board and client meetings regarding investments and provide training and periodic investment related materials for other ClearPoint employees and customers.

RESPONSIBILITIES:

- Monitor bank portfolio and cash positions, work with outside advisor on new purchases and strategic sales
- Continual monitoring of approved mutual fund list for change in managers, styles, AUM, etc.
- Monitor watch list of mutual funds and make recommendations for appropriate action to be discussed with clients
- Periodic review standard allocation models for strategy or fund changes
- Participate in quarterly Trust and Investment Committee meetings to advise committee on current invest options and market environment
- Prepare and present investment related reports to the ClearPoint board and committee members
- Participate in 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 for staff use when talking with clients
- Monitor outside investment managers from initial due diligence to on-going reviews
- Review investment performance of outside investment managers and participate in manager meetings to represent ClearPoint's fiduciary interests
- Establish standard documents to be used when engaging outside managers
- Actively participate in senior management meetings on strategy and business growth

- Represent ClearPoint at industry events and prospective client meetings as needed to promote new business
- Oversee investment options within ClearPoint 401-k plan
- Work with third parties to facilitate interest rate risk and duration modeling and utilize them in establishing savings rates and bank investment selections
- Assist with regulatory and audit requests related to investment management and oversight
- Assist with risk assessments regarding investment management related compliance and business risks

REQUIREMENTS:

- ❑ Four year college degree in finance, business management or related field. CFA a plus.
- ❑ 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.