TRUXTON TRUST
A PRIVATE BANK

Portfolio Manager

FULL-TIME • WEALTH MANAGEMENT • NASHVILLE, TN

WHO WE ARE

Truxton Trust Company is a provider of private banking, wealth management, trust, capital markets, and family office services for wealthy individuals, their families and their business interests. Serving clients across the world, Truxton's vastly experienced team of professionals provides customized solutions to its clients' complex financial needs. Founded in 2004 in Nashville, Tennessee, Truxton Trust upholds its original guiding principle: do the right thing. Truxton Trust Company is a subsidiary of financial holding company, Truxton Corporation (OTCPK: TRUX).

MISSION STATEMENT

To do the right thing every day, putting our clients' interests first, with distinctive, comprehensive financial solutions that protect and promote client prosperity and quality of life.

WHAT WE OFFER

- 401k + company match
- Medical, life, dental, vision insurance
- Paid federal holidays and vacation
- Employee assistance program (EAP)
- Support towards continued learning and industry certifications

WHY YOU SHOULD WORK HERE

- Truxton is a highly profitable and growing company that has been recognized by American Banker as the 13th best community bank (top-ranking TN bank) based on 3-year ROAE
- Opportunities to grow your expertise, take on new challenges, and gain exposure to a wide range of sophisticated work
- Because we are a smaller company, you will have the opportunity to chart your own course and contribute to initiatives that go beyond your job title
- Opportunities for incentive bonuses through new business referral

CONTACT

- careers@truxtontrust.com
- 615-515-1700
- 4525 Harding Road, Suite 300
  Nashville, TN 37205

APPLY NOW

THE ROLE

The Portfolio Manager has dual and integrated responsibilities within Truxton Wealth services: constructing and modifying the Truxton Trust investment program and delivering thoughtful client-specific investment management. As a member of Truxton's Investment Committee, Portfolio Managers evaluate risk and return potential of firm investment strategies. Each Truxton client has a dedicated Portfolio Manager, who writes investment policies appropriate for each client's goals and circumstances and develops a plan to implement those policies. We are looking for self-motivated candidates with a passion for investments and empathy for client goals and concerns.

WHAT YOU WILL BE DOING

- Providing the Wealth investment team with insights and recommendations on its strategic and tactical asset allocation decisions given current market and economic conditions
- Delivering analytical support and enhancing internal processes for Wealth's two principal equity strategies, including portfolio construction, idea generation, screening, qualitative analysis and buy/sell decisions
- Evaluating various domestic and international equity asset classes and sectors to identify investment risks and opportunities
- Providing broad analytical support for the Wealth investment platform on third party investment products including Separately Managed Accounts, ETF's, Mutual Funds, and alternative asset managers
- Partnering with Wealth Advisors to develop and deliver comprehensive strategic financial advice to Wealth prospects and clients by using quantitative skills to review current investment holdings, budgets, alternative assets, tax situation, estate plans, liquidity needs, insurance coverage, etc.
- Articulating investment concepts, strategies, recommendations, and results to clients and prospects, including written commentary for distribution
- Implementing and maintaining client portfolios ensuring consistency with investment policy, Wealth asset allocation guidelines, appropriate risk controls and desired tax efficiency
- Serving as advocates for Truxton Wealth by seeking new client relationships and deepening existing client relationships

WHAT WE ARE LOOKING FOR

Attributes and Abilities

- Strong foundational command of the investment and comprehensive wealth management industry, practices and issues
- Firm understanding of trust administration, tax and investment management
- Eager to understand client's financial situations and personal circumstances
- Able to deliver distinctive and thoughtful client service and expertise in a manner that secures client confidence
- Adoption of our culture of entrepreneurship and teamwork

Experience and Skills

- 10+ years of relevant wealth and investment management experience
- Proficient in robust analytical systems such as FactSet and Bloomberg

Education and Designations

- Bachelor's Degree in Finance, Accounting, or Economics preferred
- Advanced Degree, JD, or MBA preferred
- CFA Charter Holder designation preferred