

## **Associate Portfolio Manager for Registered Investment Adviser**

Athena Capital Advisors LLC

Job Title: Associate Portfolio Manager

Location: Lincoln, MA

Full/Part Time: Full Time (FTE)

Regular/Temporary: Regular

### **Description:**

Athena Capital Advisors is seeking an Associate Portfolio Manager (APM) to join its Portfolio Management Team. Reporting to the Managing Director of Portfolio Management, the candidate will assist the Portfolio Managers in constructing and managing client portfolios, responding to client requests/inquiries, executing transactions, and preparing/reviewing client reports and analysis. The Associate Portfolio Manager role presents a growth opportunity for a motivated individual seeking direct involvement in the client portfolio management process in a dynamic and growing firm.

Importantly, Athena has a strong culture and seeks individuals who represent our core values of Excellence, Passion, Integrity and Caring.

### **Our Company:**

Athena provides investment management, research and related services to high net worth individuals and non-profit institutions. With approximately \$5.5 billion under management, Athena has a strong culture and seeks individuals who represent our core values of Excellence, Passion, Integrity and Caring (EPIC). For additional information on Athena, please visit [www.athenacapital.com](http://www.athenacapital.com).

### **Job Duties and Responsibilities:**

- Prepare and review client investment materials, including investment policy statements, quarterly reports, cashflow reconciliations, balance sheets, etc.
- Prepare materials synthesizing investment research and performance reporting to assist in forming portfolio recommendations
- Perform quality assurance on clients' performance reports
- Prepare for client meetings/conference calls
- Maintain a working knowledge of current events in global investment markets, estate planning and tax policy
- Assist in data management and maintain best practices within the group
- Monitor and coordinate with Client Service Team on cashflows and wire transfers
- Participate in daily market research meetings
- Attend Athena Investment Committee meetings

### **Requirements:**

- Bachelor's degree (preferably in Finance, Accounting, Economics or related field)
- Preferably 1 year or more of investment or accounting experience
- Strong Excel and Bloomberg skills
- A general understanding of, and an interest in, the securities market

*Please note this description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this position. Duties, responsibilities and activities may change at any time with or without notice.*

*Interested candidates should send resume, cover letter to [resumes@athenacapital.com](mailto:resumes@athenacapital.com) with the title "Associate Portfolio Manager". No phone calls please. References will eventually be requested from finalists in the interview process.*

*Athena Capital Advisors LLC is an equal opportunity employer and affords equal opportunity to all applicants for all positions without regard to race, color, religion, gender, national origin, age, disability, veteran status, sexual orientation or any other status protected under local, state or federal laws. Successful candidates must be able to work in the U.S. for other than practical training. Nothing in this job posting should be construed as an offer or guarantee of employment.*