Why We Exist

At the Trust Company of Tennessee, we believe everyone can live confidently and reach their financial goals. Would you like to be part of a team that works with individuals, families, businesses, and foundations to identify what success looks like and formulate a plan to get there? Come join our team of Wealth Management, Trust, Estate Administration, and Corporate Retirement Plan professionals who proudly help clients achieve their dreams.

Job Title: Portfolio Analyst
Reports To: Chief Investment Officer
Classification: Full Time – Exempt

Core Purpose

The Portfolio Analyst is responsible for managing assets with a full understanding of our investment philosophy, process, and client-specific objectives. The position will work closely with TTC's client service teams to understand each account's return and risk objectives and unique circumstances.

Responsibilities

- Shows a commitment to The Trust Company's Mission, Core Values, and Client Promise.
- Performs asset management activities for wealth management accounts, personal trusts, endowments, and other investment advisory relationships.
- Performs account reviews to ensure holdings are aligned with the Investment Policy Statement (IPS).
- Executes trades in accounts based on investment decisions and regular account reviews.
- Ensures all accounts have a current and signed IPS documented in their respective folders.
- Responsible for adhering to regulations and internal policies, as well as responding to escalating risk issues in a timely manner.
- Provides a proactive and timely service to the client service team so they can deliver relevant information to clients and prospects.
- Maintains complete and thorough knowledge and understanding of client investment parameters.
- Advises on new accounts and assists in the process of transitioning positions to TTC models – including understanding tax consequences when applicable.
- Understands and effectively communicates how economic and market environments impact portfolio performance.
- Assists with ensuring that benchmarks and asset categories are correct in Black Diamond.
- Assists with pulling and storing monthly performance information and updating monthly investment materials when needed.
- Assists with improving and strengthening the portfolio management process via the use of software and other tools to reduce manual and more time-consuming processes.
- Works with the CIO to refine and execute on investment philosophy and policy with clients based on their goals, objectives, and risk tolerance.
- Other tasks and projects as assigned.

Qualifications

- Bachelor's degree in Finance or related field
- 1 to 3 years of industry experience
- Strong communication skills
- Organized and detail-oriented
- Proactive focus
- Basic understanding of financial markets and securities

Send resume to careers@thetrust.com *Revised 2021-04-26*