



Impact Investors

PLANNING & ADVISORY SERVICES

Portfolio Manager for Socially Responsible Wealth Management Firm

Seeking analytical, organized, team player with an ownership mentality to manage the investment process and present to socially responsible investors.

Impact Investors is a wealth management firm specializing exclusively in impact and socially responsible investments. Our investment strategy merges financial and social returns. Passion and care for the planet, people, and social change are key for this position.

Key Responsibilities:

- Work with our Investment Committee and under the Principal Advisors to continuously evolve and implement our firm's portfolio management systems and processes, to include social and environmental impact criteria.
- Provide Investment Committee with formal quarterly reports, watch lists, performance reports, and broader market conditions to be aware of concerning our stock, bond, and mutual fund portfolios.
- Create systems and documentation to allow for other members of the firm's staff to perform portfolio management tasks as needed and to document decisions made.
- Oversee Associates and/or Analyst employees hired to support the portfolio management duties.
- Manage firm trading tasks in adherence with industry and firm compliance requirements.

The above represents key responsibilities, though the position's duties may change and grow with firm growth.

Qualifications:

- Hands-on experience with financial and social metrics of publicly traded securities (mutual funds/ETFs, stocks, bonds, and more)
- Experience with project management and managing tasks for multiple ongoing projects
- College degree required
- CFA designation preferred
- Experience working with virtual teams
- Love of accuracy, order, and attention to detail
- Good communication skills, including giving and receiving feedback with curiosity and inquiry
- Very comfortable with computers and technology
- Unparalleled ethics, self-starter (background checks will be completed)

Benefits:

- Highly competitive salary
- Medical, dental, eye insurance (family coverage)
- Team performance bonuses
- 401(k) match
- Generous PTO policy
- Value incentive bonus plan

Position is remote/virtual, with potential in-person staff retreats when generally safe. Women, people of color, and LGBTQ folks are strongly encouraged to apply.

Please **securely upload your resume (PDF or Word format)**, along with a brief cover note that includes your compensation objectives to <https://www.theimpactinvestors.com/upload>

Impact Investors, Inc is an SEC-registered RIA with approximately 300 clients and 200 million under management. We are a geographically agnostic firm dedicated to aligning client investments with their values.