PORTFOLIO MANAGER (BOULDER OR DENVER)
BSW INVESTMENT GROUP

Ideal Candidate – Who You Are:

- Are you driven and determined to be one of the best investment professionals in Colorado?
- Are you passionate about investing, portfolio management, and helping others achieve their financial goals?
- Do you have experience overseeing the management of multiple client portfolios? Rebalancing, tax loss harvesting, asset allocation - been there done that? Do you have a deep understanding of risk drivers in portfolio construction and management?
- Are you skilled at engaging with clients, helping them understand investments and, most importantly, understanding them as people?
- Do you enjoy sniffing out great investment strategies, executing rigorous due diligence, and cultivating manager relationships? Are you passionate about both traditional investing and Impact/SRI/ESG? Have you managed portfolios with public and private investments?
- Are you excited by the prospect of building and managing processes? Does your mind race with how to do things more consistently, with scalability, excellence, and efficiency?
- Are you looking to grow with an innovative investment team and join an independent, employee-owned, and nationally recognized RIA firm?

BSW Wealth Partners – Who We Are:
BSW is a multi-family office and wealth advisory firm managing $1.4 billion for a national and international clientele from offices in Boulder and Denver. Our purpose is to Make Life Better. BSW has been named a Best Place to Work by Outside Magazine, Investment News, and the Denver Business Journal; one of the top 300 Financial Advisers by the Financial Times; is Gender Equity Now certified; a Certified B Corporation; and a Public Benefit Corporation (PBC).

Position Description – Your Dream Positions:
The BSW Portfolio Manager role comprises the following:

1. Optimal and strategic management of BSW client portfolios.
   Each BSW client is served by a team of three professionals: Advisor (client-lead + financial planning), Portfolio Manager (portfolio + investments), and Client Service Manager (client liaison + operations). Partnering with your Advisory Group and Operations Group colleagues to develop, implement, and maintain BSW client portfolios.
2. Investment advice, insight, and guidance to BSW clients.
   Engaging with BSW clients on investment-specific matters. Serving as the "voice of BSW's investment group" to the client and within the client's team.
3. Asset class due diligence.
   Following and improving upon BSW's due diligence process for the oversight and management of ingredients in specific asset classes (examples: fixed income, equities, private real estate, private equity, alternatives). Investment research, due diligence, establishing/building/maintaining manager rapport. Communicating the merits and organizing the implementation of new investment strategies used by the firm.

Qualifications – The Right Stuff:

- Passion for investing, serving clients, building a firm, and the drive + motivation + grit to succeed.
- Demonstrated excellence and achievement in in the investment field, **strong preference for RIA-specific experience.**
- Chartered Financial Analyst (CFA) or other relevant credentials preferred.
- Series 65 preferred.
- Undergraduate degree; MBA or MS-Finance advanced degree preferred.
- Attention to detail, well organized, self-motivated & self-managed.
- Outstanding integrity and discretion.
- Strong interpersonal communication skills, and comfort/experience working with existing and prospective clients.
- Experience with portfolio rebalancing software such as Tamarac Rebalancer and Schwab/Fidelity custodial platforms preferred.

Perks – Why We're A Perennial Best Place To Work:

- Winter & Summer Fun Days
- Profit Sharing, 401(k) Plan + Matching
- Health Savings Account + BSW-funded Healthcare
- Paid Maternity & Paternity Leave
- BSW pays for obtaining and maintaining professional certifications
- PTO Days for Volunteering
- Healthy Lifestyle & Custom Workspace

B-Corp Status, Diversity & Inclusivity – Another Reason You Will Be Proud to Work at BSW:
BSW Wealth Partners is a proud to be both a Public Benefit Corporation (PBC) and a Certified B Corporation. Certified B Corporations are for-profit companies seeking a better way to do business by meeting the highest standards of third party-verified social and environmental performance, accountability, and transparency. B Corp certification is part of a global movement that serves to redefine success in business so that companies aspire not only to be the best in the world, but best for the world. BSW's certification highlights our commitment to diversity, equity, inclusion, and gender equity. **BSW is a company based on merit and excellence that welcome all races, genders, and sexual orientations.**

We encourage applications from all qualified candidates, including:

- Traditionally under-represented populations within financial services.
- Parents returning to the workforce after extended career breaks.
- People with physical disabilities or limitations.
- Transitioning military service members and veterans.

Application Process:
Submit your CV/résumé and a cover letter to nmurphey@bsw.com. In your cover letter, please address the following:

- *In your own words (20 or less), describe what you think BSW does.*
- *What are the top three reasons you are the best candidate for this position and for BSW?*
- *Why are you interested in our firm and this industry? What aspects? Do you have any applicable professional experience?*