



## **JUNIOR PORTFOLIO MANAGER**

### **BSW INVESTMENT GROUP**

#### **Ideal Candidate – Who You Are:**

- Are you driven and determined to build a career in investment management?
- Are you interested in investing, portfolio management, and helping others achieve their financial goals?
- 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 Position:**

The BSW Junior Portfolio Manager role supports BSW's Investment Group and Portfolio Managers through:

1. Ongoing management of BSW client portfolios, including trading, rebalancing, and tax-loss harvesting.
2. Supporting Portfolio Managers in the design and implementation of client portfolio strategies.
3. Supporting investment operations including daily block trading, data management, and process execution.
4. Providing analytical and quantitative support to BSW's Investment Group.

#### **Qualifications – The Right Stuff:**

- The drive + motivation + grit to succeed.
- Undergraduate degree.
- 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.
- Ability to learn, understand, and master portfolio management platforms (Tamarac Rebalancer, Schwab, Fidelity, etc.)



**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 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?*



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