Portfolio Manager

Position Specification

RZH Advisors LLC

One Landmark Square, 11th Floor

Stamford, CT 06901

203.355.0880

THE COMPANY

Founded in 2000, RZH Advisors (RZH) is an SEC Registered Investment Advisor and is an independent, partner-owned, wealth management firm located in Stamford, CT managing over $2B in AUM. RZH has been nationally recognized as a top wealth management firm by multiple premiere rating services including Barrons, Forbes|SHOOK and InvestmentNews.

RZH provides comprehensive wealth management services to affluent individuals and multi-generational families. We empower our clients to be comfortable with their wealth, enjoy their wealth and be confident that their family is protected from the financial uncertainties of life.

Our approach to financial planning and deep client interaction has allowed us to be very selective focusing on HNW individuals and families in transition, women on their own for the first time financially, retiring executives and management of trust assets.

Specializing in complex financial situations, where diverse assets and family dynamics can be challenging, our firm has built a reputation for objectivity and care by crafting meaningful and effective planning solutions. Areas of expertise include: inter-generational comprehensive financial planning, cash flow planning and tax strategy, investment management and planning, risk management and planning, trust management, wealth preservation and transition.

THE POSITION

Position:	**Portfolio Manager**
Primary Location:	**Stamford, CT – In-Office Four Days/Week**

The Portfolio Manager ("PM") will work with the Partners and Financial Advisors to manage the investment component of client accounts. The PM is expected to conduct detailed research and due diligence on mutual funds, ETFs, individual stocks, bonds, and alternative investments and will be responsible for creating, researching, developing and maintaining the firm's investment guidelines. You will execute daily portfolio trades and perform portfolio re-balances using custodial trading platforms and/or Orion Eclipse. You will be expected to perform various tasks including portfolio administration and operational support. You must possess strong critical thinking skills, work well both independently and in a team, and have a solid command of technology. Qualified candidates will be detail-oriented, have a positive attitude and an ability to balance multiple priorities and tasks. As this is a new role, this is your chance to play a key role in the path your career takes and in the continued success of our company. Our culture is fast-paced, collaborative, and passionate about improving our clients' lives.

POSITION REQUIREMENTS

- 5-10 years' experience in wealth management, or portfolio management preferably in an RIA environment
- Bachelor's degree preferably in finance, economics and/or accounting
- Deep understanding of and competence in investment fundamentals
- Demonstrated strong analytical and research skills, particularly investment vehicles and portfolios, with the ability to make decisions based on research and performance
- Knowledge of SEC compliance issues and ability to work within rules and procedures

- Series 65 or 66 license
- CIMA® or CFA® designation strongly preferred or willingness to obtain (or begin to obtain) within 1-year of hire date
- Strong working knowledge of Excel, PowerPoint, and Word. Knowledge of Orion a plus.
- Strong mathematical, communication, written and verbal skills
- Impeccable attention to detail.

RESPONSIBILITIES

- **Investment Research & Analysis**
  - Conduct detailed research and due diligence on mutual funds, stocks, bonds, and alternative investments.
  - Compile and assess investment product offerings on an ongoing basis.
  - Work directly with Partners and Financial Advisors to determine optimal investment strategy for clients based on stated goals and risk tolerance.
  - Create, monitor, and adjust the firm's investment guidelines and strategy depending on economic conditions and individual client circumstances.
  - Lead and direct the RZH Investment Committee and educate advisory team on economic changes that may affect client outcomes.

- **Portfolio Administration**
  - Research, analyze, and recommend investments, and demonstrate an acceptable track record in investment selection consistent with needs and goals.
  - Manage, evaluate, monitor, and make rebalancing decisions in portfolios on an ongoing basis, to help ensure optimal portfolio performance.
  - Supervise the preparation and maintenance of all the documentation necessary for trades and transactions.
  - Execute securities transactions in a timely and efficient manner consistent with the firm's best execution policies.
  - Maintain Orion Eclipse trading system including but not limited to setting cash reserves, alternate securities, restricted securities, etc.
  - Provide transaction information to management as requested

- **Support marketing and sales efforts as needed**
  - Partner with business development to articulate the investment strategy and results to prospects and clients, as needed.
  - Work with advisors on individual investment proposals, as requested.

COMPETENCIES

- **Communication**: Ability to communicate effectively, both verbally and in writing, to individuals at all levels.
- **Teamwork**: Ability to contribute as part of a team and independently as needed, and deal with individuals at all levels within the business.
- **Professionalism**: Have the strength of character and personal qualities to promote open and constructive relations with colleagues and clients.

- **Flexibility**: Possess flexibility for and commitment to continual service development and improvement. Ability to prioritize and multi-task effectively.

WHAT WE OFFER

- A collaborative environment that enables you to step outside your role to add value
- Opportunities to grow your expertise, take on new challenges and reinvent yourself
- A highly competitive compensation package, including a base salary, bonus and profit-sharing incentives
- A superior, comprehensive benefits package emphasizing good health, financial security and peace of mind
- Paid time off, paid NYSE holidays, health & wellness benefits, and company-paid parking in Landmark Square

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