Associate Portfolio Manager - Job Description

Centura Wealth Advisory is looking for an Associate Portfolio Manager (APM), reporting into the Chief Investment Officer (CIO).

As the APM, your primary responsibilities would include assisting the CIO in delivering on the department's vision. Responsibilities will be broad and include trading, investment analytics, research projects, alternative investment due diligence, vendor management, data management, report and presentation generation, compliance, and participation in other firm initiatives. It is expected that the APM will become a contributing member of the firm's Investment Committee.

We are looking for a motivated team player with some investment experience under their belt and the desire to grow in their career. This role requires you to be highly organized with very strong financial acumen and high attention to details. As the APM, you will play a critical hands-on role in the firm's growth and development.

In this role, you will work closely with the CIO, Advisors, Partners, Financial Planners, Marketing, Compliance and the Investment Committee.

Roles and Responsibilities:

The key areas of responsibility include:

1. Trading
2. Research
3. Data Management
4. Reporting & Communications
5. Advisor/Sales Support

Additional Success Factors:

You will be required to develop and maintain strong working relationships with all members of our team, custodians, third party managers, and consultants and other vendors. You will be delivering reports and other work products to internal and external clients, therefore, writing and presenting skills will be essential. This role requires a high degree of efficiency in data interpretation and diligence.

You will need to be comfortable with taking ownership of projects and executing them or seek assistance when required to deliver desired results. The role will also require documenting certain operational processes clearly in an ongoing effort to institutionalize all operations. Strong communication skills will be essential in this team environment.

Qualifications & Experience:

- Experience & licensing:
    - 5+ years of financial services experience at an investment manager, brokerage firm, RIA or similar
    - Experience in trading public securities at an institutional level
    - Undergraduate degree is a must, preferably in business administration, economics, or finance
    - CFA or CFP a plus
    - Series 65 or 66

• Communication skills:
- Excellent interpersonal relationship skills required
- Highly effective oral and written communication skills required (45wpm typing skill min)
- Able to prepare client facing communications in a professional manner (word, ppt)
- High EQ - emotional intelligence is a plus

• Analytical skills:
- Ability to read & decipher contracts
- Understanding of business entities and their various structures

• Software usage & proficiency:
- Microsoft Office: Excel, Outlook, Word, PowerPoint – required
- Excel modeling and advance functions - required
- Orion Advisor software (PMS, Eclipse, Astro) – preferred plus
- Salesforce - preferred
- Brokerage trading and account interfaces (eg: Veo, Fusion, etc)
- Market databases and analytics (eg: Morningstar, Koyfin, Hidden Levers, ThinkPipes)

What we provide you:

• Competitive compensation includes:
  - Salary
  - Bonus
• Opportunity to contribute to a dynamic, fast-paced business that is experiencing rapid growth
• Open and supportive team-based environment
• Paid Time Off
• Full medical, dental, vision benefits

Centura Wealth Advisory, located in San Diego, is an SEC Registered Investment Advisory firm delivering innovative wealth management services to affluent families, local business owners, and charitable organizations. Our skilled professionals have been crafting sophisticated financial solutions as a team since 2005, yielding total wealth efficiency and purpose to those looking to liberate their wealth.

We achieve this by focusing on our clients' needs, upholding the highest ethical standards, fostering a tradition of quality, and investing in the individuals who, together, form our team. In doing so we cultivate a culture of excellence visible throughout all facets of the company, our practices, and most of all, the work we do for our clients.