



## Lowry Hill Portfolio Manager

Location: Naples, FL

Lowry Hill is a private asset management firm overseeing approximately \$4.7 billion in assets for nearly 300 clients in 43 states from offices in Minneapolis, Chicago, Naples and Scottsdale.

### Position Description:

The Lowry Hill Portfolio manager will develop, recommend, and direct execution of investment strategies for a group of clients. The PM will manage complex investment portfolios for investment accounts and fiduciary (irrevocable and revocable trust) accounts. The PM will have broad investment authority and independence to act within established investment policy guidelines.

The PM must also collaborate with clients, relationship managers, financial consultants, private bankers, and account administrators to develop investment strategies based on investment philosophy and client objectives.

### Other responsibilities include:

- Utilize an investment consulting approach to execute investment strategies leveraging individual securities, pooled vehicles, open architecture platforms, and alternative investments to maximize returns commensurate with an acceptable level of risk.
- Help shape investment policies within the firm.
- Perform investment research.
- Confer with tax attorneys, accountants, etc., to determine other consequences of investment decisions to provide account solutions.
- Develop new business through sales/marketing while leveraging partnership opportunities throughout the firm.

### Minimum Qualifications:

- 6+ years client-facing, investment management experience
- Experience with investment performance systems and portfolio management software
- Demonstrated investment technology skills, including Power Point and Excel, for purposes of presenting investment strategy and investment research

### Preferred Qualifications:

- Wealth Management, Investment Management or Investment research experience
- MBA or advanced degree
- CFA Level 2 or higher

To learn more or apply, visit the Wells Fargo career site at [wellsfargo.com/careers](http://wellsfargo.com/careers), **Requisition# 3544068**.

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