



## Position Description

**Title:** VP & Portfolio Manager  
**Department:** Trust Department  
**Reports to:** Sr. Vice President, Sr. Investment Officer  
**Apply to:** [www.fnbhutch.bank/careers-at-the-first/](http://www.fnbhutch.bank/careers-at-the-first/)

### Summary:

The Portfolio Manager will work closely with the Relationship Manager and Administrator to manage, monitor, and maintain client portfolios. The position will assist in assigning investment objectives for clients and serve as a member of the Trust Investment Strategic Committee while ensuring compliance requirements are met for each account along with timely, efficient service to clients.

### Duties:

(The summary of duties and responsibilities listed above represent the job requirements but are not meant to be all-inclusive or prevent other duties from being assigned as necessary.)

- Meet with Administrators to review client portfolios, investment guidelines, and cash needs.
- Independently monitor and rebalance client portfolios to Investment Objectives as portfolios need and when a prescribed rebalance is warranted.
- Assist the Administrator in assigning investment objectives for fiduciary accounts, including beneficiary and remainderman risk tolerances and goals.
- Meet with Administrators to complete assigned Reg 9 reviews within the appropriate deadline.
- Assess and recommend the retention of assets received from outside firms.
- Assist in developing and implementing procedures for portfolio rebalancing and fund replacement.
- Follow the guidelines of the Selection and Retention Procedure for Approved Securities and participate in the research and data gathering efforts to maintain the Approved Buy and Hold Lists.
- Actively participate as a Trust Investment Strategic Committee member and assist in report creation for meetings.
- Monitor and maintain accurate performance monitoring reports for assigned clients.
- Complete Special projects as needed.
- Attend client and prospect meetings, take notes, and execute action items as needed.
- Comply with all department, bank, and regulatory procedures, the account governing document, and applicable IRA rules.
- Optimize tax lot harvesting and tax planning for clients as market conditions allow and warrant.

- Perform necessary actions to be taken to assist in the final steps to close an account accurately and timely.
- Take trade orders from clients with self-directed accounts.
- Keep all excess cash invested in assigned accounts.
- Periodically monitor accounts to stay in the tolerance range on asset classes in our approved portfolio and the account's asset allocation target.
- Other duties as assigned.

**Position Requirements:**

- The ideal candidate will possess a CFA, CFP, CIMA, or similar designation with at least five (5) years of experience in investing.
- High School Diploma or Equivalent
- Organized, detail and task-oriented
- Ability to work without direct supervisor input
- Adaptable to high work volumes, ability to prioritize in a fast-paced work environment