

**Trillium Asset Management**  
**Portfolio Associate**  
September 3, 2019

Trillium Asset Management, LLC is the oldest investment advisor exclusively focused on sustainable and responsible investing (SRI). We believe that environmental, social, and governance (ESG) factors play an integral role in the investment process, which can lower portfolio risk and help identify the best-managed companies.

**Job Summary**

The Portfolio Associate will provide support to the Investment Management Team in the Boston office. This position requires someone who can work both independently and as a team player, handle various responsibilities, is a technology leader, is very organized, and has superior attention to detail.

**Duties and Responsibilities**

- Assist in all aspect of client service.
- Coordinate the opening and on-going maintenance of client accounts, while taking ownership of client tasks through completion.
- Ensure client requests are completed promptly and accurately. Follow up effectively with Investment Managers on any account needs or issues.
- Prepare and process client paperwork and materials for client meetings.
- Prepare client trades for Investment Manager review
- Prepare Marketing Materials and RFP responses
- Other high-level administrative, client, and firm projects.

**Qualifications**

- Minimum Bachelor's Degree or equivalent work experience.
- 3-5 years in a financial services client service type role.
- Must have excellent organization skills and be able to perform multiple tasks concurrently with superior attention to detail.
- Must be technology oriented and an expert in all Microsoft applications. Proficiency in leveraging systems and processes to execute activities with accuracy and efficiency.
- Strong interpersonal and communication skills. Candidates must be able to effectively communicate verbally and in writing with clients, members of the firm and outside contacts.
- Establish strong working relationships with client service team members and colleagues across the organization. Take initiative to develop team members.
- Strong math, analytical, and decision-making skills are required.
- Desire and ability to work successfully in a small growing company environment.

**Compensation:**

Trillium Asset Management LLC provides a generous, compensation package that includes 401(k), profit sharing plan, group life, long-term disability, health, dental and vision insurance benefits, paid time off and performance-based bonus program.

***We will only consider applications with an attached professional resume and cover letter.***

Please email: [mmcdonough@trilliuminvest.com](mailto:mmcdonough@trilliuminvest.com)

Trillium Asset Management, LLC provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, gender, sexual orientation, gender identity or expression, national origin, age, disability, genetic information, marital status, amnesty, or status as a covered veteran in accordance with applicable federal, state and local laws.