Boston Trust & Investment Management Company

Job Opening: Portfolio Manager, Wealth & Investment Management

Company Overview

Boston Trust & Investment Management Company (Boston Trust) is a 100% employee owned firm that provides portfolio management services to individual and institutional clients. The firm manages approximately $8 billion in client assets for institutional and high net worth investors. Boston Trust employs approximately sixty people and specializes in actively managed, high quality equity, fixed income, and balanced portfolios. Walden Asset Management, a division of Boston Trust, is a leader in managing portfolios for clients whose overall investment objectives include environmental, social, or governance factors. Boston Trust Investment Management, Inc., a subsidiary of Boston Trust, is a registered investment advisor providing advice to a family of proprietary mutual funds.

Boston Trust is seeking an experienced portfolio manager to join its Wealth & Investment Management team.

Key Responsibilities

- Serve as the primary investment contact and trusted advisor for high net worth, endowment, and foundation clients and manage client portfolios, including individual securities and funds.
- Provide superior client service and investment advice tailored to each client's specific financial objectives and consistent with the firm's investment policies.
- Review and discuss financial objectives, risk tolerance, and client-specific needs to develop informed investment solutions and offer financial guidance on an array of topics.
- Work collaboratively with other members of our investment and client service teams to ensure optimal client experience.
- Assist in the development of investment policies and strategy as well as contribute to securities research and analysis as needed.
- Develop and cultivate relationships with our clients' third-party professionals (e.g. attorneys, accountants)

Qualifications

- Bachelor's degree or higher required
- Minimum of 7 to 10 years managing client portfolios within the wealth management industry
- CFP and/or CFA designation is desired
- Excellent verbal and written communication skills
- Financial planning, tax, estate planning experience a plus
- Experience managing portfolios with social and environmental considerations an advantage

Boston Trust & Investment Management Company and Walden Asset Management are committed to diversity in the workplace. We seek to create an environment where all employees' abilities and energies are fully utilized. We believe diversity enhances our opportunity to build a high-performance culture that enables us to succeed in a competitive business. Reasonable accommodations will be made available to any applicant requesting them for the application process. Boston Trust & Investment Management Company is an Equal Opportunity Employer.