



Assistant Portfolio Manager

Garde Capital, a Registered Investment Advisor (RIA) located in Seattle Washington, is seeking a candidate for the position of *Assistant Portfolio Manager*. This individual will report to the lead Portfolio Manager and the CIO. The Assistant PM will work closely with the Portfolio Manager on trading, research, and other analytical projects. The Assistant PM will also play a key role in the optimization of our client acquisition and ongoing client service processes.

General Responsibilities include:

Portfolio Management

- Work with Portfolio Manager to implement stated risk strategy in client portfolios within the context of a globally diversified index-based approach
- Identify strategies for creating operational efficiencies in portfolio management, research, and trading execution
- Review and monitor portfolio risk characteristics and compliance with investment guidelines, and implement rebalancing actions in accordance with the investment policy
- Execute trades at the direction of Portfolio Manager and/or advisors
- Utilize market data tools such as Morningstar and FactSet for portfolio analysis
- Manage and monitor all aspects of the portfolio accounting and reporting software
- Assist Portfolio Manager in reviewing and monitoring new research and industry practices and assess relevance for investment portfolio modeling

Client Acquisition and Client Service

- Manage data analytics for Garde Capital wealth management process implementation
- Assist advisors with client acquisition and service
- Assist with portfolio analytics, client reports, and proposals
- Create financial plans and assist with monitoring of estate, tax, and charitable giving plans for clients
- Optimize usage of Salesforce tools to track all aspects of wealth management process

Required Qualifications:

- Completed Bachelor's Degree
- CFA or CFA Candidate
- Tamarac experience not required, but experience with portfolio accounting software is preferred
- Strong MS Excel skills
- MoneyGuide Pro experience not required, but experience working with financial plan software is preferred (such as E-Money, Navistar, or other)
- Outstanding verbal and written communication skills
- Demonstrate initiative and ability to work in fast-paced environment
- Strong desire to learn and apply technology to growth of the firm

Additional Information:

- Competitive base salary and bonus, commensurate with experience and achievement of performance
- Substantial profit sharing and 401k Match
- Medical / Dental, HSA plan available

It always has been and continues to be Garde Capital's policy that employees should be able to enjoy a work environment free from all forms of unlawful employment discrimination. All decisions regarding recruiting, hiring, promotion, assignment, training, termination, and other terms and conditions of employment will be made without unlawful discrimination on the basis of race, color, national origin, ancestry, sex, sexual orientation, gender identity or expression, religion, age, pregnancy, disability, work-related injury, covered veteran status, political ideology, genetic information, marital status, or any other factor that the law protects from employment discrimination.