

Client Portfolio Manager

The need for this hire is driven by the growth with our [Canvas](#) offering. Canvas is a revolutionary [Custom Indexing tool](#) designed to improve the relationship between asset managers and allocators. The Client Portfolio Manager sits between our Client Service & Sales and Portfolio Management Teams. This is a client facing role that will communicate with clients and prospects on behalf of our Portfolio Managers while also advocating internally for client needs. A primary duty will be consulting with clients and prospects to design investment allocations that suit their goals, needs, and preferences.

Key requirements of the position include:

- Partner with our Sales & Client Service Team to ensure high quality engagement with clients and prospects.
- Maintain an in-depth understanding of the firm's Factor, Passive, and Defensive offerings with particular awareness of tax management and ESG capabilities.
- Work with our Research, Performance, Technology, Compliance, and Creative Services teams to develop presentation materials and strategy commentary.
- Play an important role in editing RFP's/RFI's
- Outstanding presentation and communication skills, particularly via phone/video
- Exceptional client service/relationship building skills and demeanor
- Experience working with data for primary research
- Superior work ethic
- Ability to multi-task
- Intellectual curiosity and passion for financial markets
- Strong analytical skills
- Self-starter
- Strong time management and organizational skills
- Team player

Highly Desirable:

- Previous experience in asset management or financial services
- CFA designation
- Basic knowledge of SQL, or similar coding language

Compensation/benefits:

- To include salary, discretionary bonus, health insurance, vacation and industry training.

About the Firm:

O'Shaughnessy Asset Management is an independent, employee-owned research and money management firm based in Stamford, CT. The firm manages approximately \$6 billion in assets for institutions and high-net-worth individuals through their financial advisors. Pioneering equity researcher Jim O'Shaughnessy and his team of analysts have done extensive research over a period spanning more than eight decades to identify the characteristics for stocks that have led to successful investing based on absolute, risk-adjusted, and consistency of returns. Our approach to managing money is transparent, logical, and completely disciplined, leading to long-standing relationships with our clients.

For more information on our firm, please visit our website at www.osam.com. Resumes can be sent to careers@osam.com.