

Investment Portfolio Manager

Geographic Focus: East Coast - Philadelphia, New York, Washington D.C.

## Introduction to Zenith

Zenith Wealth Partners (Zenith) is a fee-only investment management and financial planning firm on a mission to combat racial, age based, and gender wealth inequality by delivering comprehensive, high quality, and accessible advice to individuals and institutions. We believe that wealth management does not begin only when a client has accumulated significant wealth. Managing and achieving wealth is an infinite journey. Zenith works with its clients to evaluate the best financial decisions while giving them back time and peace of mind.

## Position Summary

Zenith has built a high-functioning investment management operation over the last three years and anticipates accelerated growth in assets under management over the next five years. To continue providing excellent service to our existing clients and help fuel the next wave of growth, Zenith is seeking a driven and mission-oriented Portfolio Manager to join our expanding team. The role is remote-first with periodic travel to Zenith's central office in Philadelphia. Reporting to the Founder and Investment Director, this person will be responsible for:

- **Investment Strategy & Execution**
  - Design custom asset allocation models that are informed by economic trends and align to the firm's proprietary PEAK framework.
  - Manage Zenith's PEAK Equity Fund, a concentrated and aggressive strategy designed to allocate 100% of holdings to large cap equities throughout market cycles that are aligned to Zenith's PEAK framework.
  - Buy, sell and rebalance securities in private client and institutional accounts as needed to reach stated investment objectives and/or maintain a specific investment strategy.
  - Manage Zenith's Investment Committee and serve as a voting member.
- **Fund Investment Management**
  - Conduct due diligence and make investment recommendations for new private placements for Phirst Market Ventures and the Zenith Leaders' Fund, including investment valuation, assessment of growth potential and risk identification.
  - Complete fund-level performance reporting and analytics to share with investors.
- **Client Service**
  - Collaborate with the Financial Planning team and participate in key client meetings to deliver a client's investment strategy and/or proposed adjustments.
  - Build investment proposals for individuals and families.
  - Keep abreast of trends and developments in the economy and markets to ensure effective communication to clients and partners.
- **Enterprise Growth**
  - Build a high-performing investment management function, including supervision of Investment Analyst and a Business Development Manager.
  - Support business development efforts led by Investment Director by preparing for and participating in client pitches as requested.

Success in this role will be primarily measured against growth in total assets under management and investment performance against relevant market benchmarks.

## Desired Knowledge & Skills

- Relevant investment management experience; candidates with past experience in public equities and alternative asset classes are encouraged to apply, as are generalists.
- Bachelors' degree from an accredited institution
- Chartered Financial Analyst (CFA) or Chartered Alternative Investment Analyst (CAIA) preferred and/or clear path to completion within 12 months.
- Detail-Oriented – You sweat the small stuff and take pride in your work
- Curious – You have a thirst for learning and eager to continue developing as a professional
- Translator – You can take a complex idea and make it easy to understand
- Competitive – You strive for the absolute best performance and are relentless in achieving it
- Disciplined – You employ a fact-based decision making approach and are not easily distracted

## Compensation & Perks

Zenith embraces a high-performance culture and seeks to reward employees that deliver exemplary results. The position will earn a competitive base salary and is eligible for quarterly performance incentives based on prior experience.

To deliver your best performance, we believe it is critical that you invest in self-care. Company benefits include (20) days paid time off, one day off to celebrate your birthday, and an additional (10) holidays observed by the NYSE. Additionally, employees will have access to health benefits (e.g., medical, and dental insurance).

Zenith prides itself on being a supportive workplace dedicated to employees' personal and professional growth. Zenith reimburses all employees for up to \$1,000 to engage in continuing education. Additionally, Zenith will provide you with a company-owned laptop (Apple or Lenovo) for your work.

Zenith provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability or genetics. In addition to federal law requirements, Zenith complies with applicable state and local laws governing nondiscrimination in employment in every location in which the company has facilities. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation and training.

Pre-employment background checks will be conducted for candidates offered employment.

## Next Steps

We would love to hear from you and will be collecting candidate materials on a rolling basis.

Please submit your **resume** and a **short note to let us know what inspired you to apply** to [Talent@NetworthZenith.com](mailto:Talent@NetworthZenith.com),