

Position Title: Portfolio Manager

Palisade Asset Management is a Register Investment Advisor (RIA) located in Minneapolis, Minnesota. Palisade manages investments for a nationwide client base that includes high net worth families, individuals, and small to midsize institutions. Palisade's focus is on high quality investments and superior services that exceed our client's expectations. Palisade is seeking to add a talented professional to our team to serve in the role of Portfolio Manager. The Portfolio Manager will have the principal responsibility of managing portfolios uniquely tailored to each client's growth and cash flow needs. The Portfolio Manager is also expected to participate as a member of the firm's team of investment analysts. This role requires investment knowledge across all asset classes: equities, fixed income, exchange traded funds (ETF), mutual funds, separately managed accounts (SMA), and alternatives. The successful candidate will possess a desire to communicate with clients regarding their investments as well as dedicate the time necessary to develop enduring client relationships.

Responsibilities Include:

- Managing equity, fixed income, and balanced portfolios for clients.
- Constructing client portfolios utilizing mostly proprietary research and some non-proprietary products.
- Designing client portfolios using individual stocks, bonds, and funds determined by Palisade's internal investment analyst team.
- Analyzing various investments such as equity, fixed income, ETFs, mutual funds, SMAs, and alternatives as a member of the investment analyst team.
- Ensuring strategic modifications are properly implemented into each client portfolio.
- Meeting with clients to review their portfolios and stock holdings and to discuss the performance of their portfolio. Some travel may be required.
- Meeting prospective new clients and partnering with our business development team to acquire new clients. Some travel may be required.

Qualification Requirements:

- Bachelor's degree
- 10+ years of investment management experience in related role
- MBA, CFA, or CAIA designation preferred
- Demonstrate self-motivation, emotional intelligence, and strong ethical and professional standards
- High level of curiosity, sense of ownership, and accountability
- Excellent analytical skills, research techniques, strategic thinker, problem solver, and decision maker
- Strong presentation and communication skills
- Strong attention to detail and accuracy with the ability to plan, organize, and prioritize within a small company
- Willingness to learn our proprietary and established investment strategies

- Work as an analyst and a portfolio manager within a small team to cover investment universe
- High level of understanding of equity and fixed income investments and economic and market conditions

Salary and Benefits:

- Salary will be commensurate with experience
- Bonus based on company and individual performance
- Benefits include 401(k) profit sharing, health care and dental insurance, fitness club access, and parking
- Flexible work environment

How to apply

Please send cover letter and resume via email only to:

info@palisadeam.com

No phone calls please