

Company: UMB Financial Corporation

Position: Senior Portfolio Manager

Location: 1010 Grand Blvd, Kansas City, MO 64106

Pay: Based on experience

Description:

Manage assigned accounts for high net worth (HNW) clients which requires significant client relationship management and new business development.

- Assigned relationships are high profile, high AUM and complex in nature.
- Implement the investment policy within portfolios for which UMB has investment responsibility and communicate this policy to HNW clients.
- Increase Assets under Management (AUM) and revenue by conveying the UMB investment process and policies to prospective clients to complete the sale of investment services.
- Build and maintain customer relationships through quality customer service, anticipating client needs, and communication to meet defined objectives.
- Other duties as assigned.

Job Minimum Requirements :

- College degree or relevant equivalent experience
- 8+ years' experience in Investment Management, Financial Planning or Brokerage that includes communicating complex and detailed information related to investment management process and portfolio construction

Job Preferred Requirements :

- One of the following credentials: MBA, CFA, CFP, CPA, or JD
- Direct experience managing and rebalancing individual portfolios through a multi-asset class investment strategy
- Supervisory or team leadership experience

Job Preferred Knowledge and Skills :

- Demonstrates ability to easily adapt to all defined technology platforms
- Demonstrates competence in all trading requirements including portfolio modeling and order entry with the objective being to minimize trade errors
- Ability to direct, as appropriate, members of service team to help ensure clients achieve their long term objectives and to build lasting client relationships
- Willingness to pursue additional, advanced certifications and other training (CFA, CFP or other relevant license) as needed
- Active in community and professional organizations

To apply or for more details about the position, visit <http://careers.umb.com> and search for job requisition #8720.