



# Portfolio Manager IV

Salary Group: B33

Class Code: 1143

CLASS TITLE	CLASS CODE	SALARY GROUP	SALARY RANGE
PORTFOLIO MANAGER I	1140	B27	\$84,182 - \$142,374
PORTFOLIO MANAGER II	1141	B29	\$101,860 - \$172,272
PORTFOLIO MANAGER III	1142	B31	\$123,252 - \$208,449
<b>PORTFOLIO MANAGER IV</b>	<b>1143</b>	<b>B33</b>	<b>\$149,134 - \$252,224</b>
PORTFOLIO MANAGER V	1144	B35	\$180,453 - \$305,191
PORTFOLIO MANAGER VI	1145	B36	\$198,499 - \$335,710

## GENERAL DESCRIPTION

Performs advanced (senior-level) asset management work. Work involves researching, analyzing, and evaluating securities and other investment information to implement approved investment policies and programs. May supervise the work of others. Works under minimal supervision, with extensive latitude for the use of initiative and independent judgment.

## EXAMPLES OF WORK PERFORMED

Oversees the gathering and assessment of information, including analyses of the economy and interest rate trends, from various sources; and recommends strategies for construction of large or highly complex portfolios.

Oversees and/or makes decisions on purchasing, selling, and holding transactions for assets in assigned portfolios.

Oversees coordination with traders on the timing of sales and purchase transactions.

Oversees and/or sources, conducts due diligence, and provides management and day-to-day oversight of external investment managers and general partners.

Oversees the negotiation and monitoring of investment management agreements and related schedules.

Conducts economic studies to maintain current information on holdings and recommends additional transactions.

Develops overall investment strategies, including asset allocation and risk control management.

Monitors performance of securities in assigned portfolios.

Recommends and selects portfolio strategies and appropriate mix of securities in assigned portfolios.

Coordinates and conducts equity investment activities.

May serve on investment committees.

May supervise the work of others.

Performs related work as assigned.

## **GENERAL QUALIFICATION GUIDELINES**

### **EXPERIENCE AND EDUCATION**

Experience in investment management, research, or trading work. Graduation from an accredited four-year college or university with major course work in finance, business administration, economics, or a related field is generally preferred. Education and experience may be substituted for one another.

### **KNOWLEDGE, SKILLS, AND ABILITIES**

Knowledge of securities accounting, procedures, and market operations; equity research or investment banking; statistical concepts and methods and their application to research analysis; various financial data systems; and macroeconomics.

Skill in applying statistical concepts, and in the use of a computer and applicable software programs.

Ability to act in accordance with the Chartered Financial Analyst Institute code of ethics and standards of professional conduct, to apply financial research techniques, to conduct exhaustive searches and evaluations of vast amounts of data, to communicate effectively, and to supervise the work of others.

### **REGISTRATION, CERTIFICATION, OR LICENSURE**

May require certification as a Chartered Financial Analyst (CFA), Certified Commercial Investment Manager (CCIM), or Certified Portfolio Manager (CPM).