

Investment Manager – Job Description

Park City Family Office (parkcityfamilyoffice.com) is a multi-family office located in Park City, Utah. Our multi-family office consults with entrepreneurial families; aligning and overseeing wealth management, tax, estate planning, generational wealth transfer, and family governance.

We are seeking an **investment manager** to build and develop our families' investment strategy and investment policy. You will research, analyze, and recommend investment options for both public and private investments, develop models and oversee the execution and maintenance of these investments.

This role requires a high level of discretion, sound judgement, and the ability to work with highly confidential information.

Core Responsibility

- Manager research, selection, and ongoing analysis
- Market research and opinion generation
- Private Investment: source, vet, develop written criteria
- Develops models, content for presentations, reports for meetings
- Client Investment Strategy: develop (IPS), implement, maintain

Educational/Previous Experience Requirements:

- 8+ years of portfolio management experience within an asset/wealth management firm or family office

Licenses/Certifications:

- Series 65 or 66 preferred
- Series 7

We expect our associates at all levels to:

- Grow professionally and inspire others to do the same
- Work with others to achieve desired outcomes
- Make prompt, pragmatic choices and act with the client in mind
- Take ownership and hold themselves and others accountable for delivering results that matter
- Contribute to the continuous evolution of the firm
- Have an entrepreneurial mindset

Location

This position is meant for remote work. Occasional travel is requested.

