

Family Office Portfolio Manager (Fixed Income)

RMG Associates is an executive recruiting firm specializing in ultra-affluent family client advisory. We work with Family Offices, Multifamily Offices, and Private Wealth/Asset Management firms on a national basis. RMG Associates is the exclusive recruiting firm for this search; our client is a private Family Office in Seattle, Washington. They will offer relocation benefits to the successful candidate. Our client is seeking a Fixed Income Portfolio Manager to oversee management of a treasury-focused fixed income investment portfolio. The Portfolio Manager will work with the Principals and the CEO of the family office to develop and execute a fixed income and cash investment strategy to ensure the family's investment and liquidity objectives are met. The Portfolio Manager will be responsible for fixed income manager selection and monitoring, cash flow planning, cash management, investment performance and comprehensive reporting.

The ideal candidate will have a depth of knowledge and experience in fixed income and cash investments and will thrive in a culture of high standards, attention to detail, flexibility and adaptability to change. Candidate must have at least 5 years experience in Fixed Income investment management with UHNW/ultra-affluent family client (such as a family office or MFO) or an investment advisory firm servicing clients of this profile.

The office culture is a small, congenial environment, with several members having worked on Wall Street and/or having advanced degrees from high-ranking universities. This is an eclectic, diverse, highly intelligent and accomplished group. The working atmosphere and Principal/Patriarch of the family office makes this one of the most attractive and compelling positions of its type available in the UHNW investment management market.

Minimum Qualifications:

- Minimum 5 years Fixed Income Portfolio Management with ultra-affluent family client(s)
- Highly desired the candidate have minimum 5 years Treasury and Cash Management experience.
- MBA and/or CFA preferred.
- Fixed income portfolio management and treasury experience required.

Primary responsibilities:

- Work with Principals and CEO to establish fixed income and cash investment strategy and allocations.
- Select and monitor performance of fixed income and cash managers.
- Monitor fixed income and cash portfolio performance and rebalance as needed.
- Ensure adequate liquidity and efficient cash flow planning, with attention to funding requirements for various personal business ventures.
- Ensure optimal cash management based on budgets and cash flow projections.
- Provide comprehensive reporting of investment holdings and performance, highlighting criteria of specific importance to the Principals.
- Proactively consider and monitor portfolio investments for potential tax consequences, and compile information required to meet tax compliance needs.
- Understand and adjust for risk in all aspects of the portfolio.
- Implement and ensure compliance with office control procedures and principles.

Compensation: \$200-\$300k

All inquiries will be held in the strictest of confidence. Please forward resumes to Jeannie Hwang at jeannie@rmgassociates.com. Candidates who meet the above stated qualifications who would like to discuss the opportunity are invited to call Buzz Bray at RMG Associates at 206-402-3401 x229.

For more information on RMG Associates and our opportunities, please go to our website at: <http://rmgassociates.com>

