

Fixed Income Analyst and Assistant Portfolio Manager

Clifford Swan Investment Counselors
Pasadena, California

Firm Overview

Clifford Swan Investment Counselors is an independent, 100% employee owned registered investment adviser serving high net worth individuals, families, and not-for-profit organizations. With over \$3 billion in assets under management and approximately 750 high net worth and institutional clients, Clifford Swan is committed to providing objective investment management and financial advice with personalized, responsive client service.

Position Overview

The Fixed Income Analyst and Assistant Portfolio Manager works within a collaborative culture of experienced investment professionals and client service specialists to deliver wealth management services to Clifford Swan clients. As the junior member of the Fixed Income team, the position provides strategic, trading, and analytical support, with a key focus on reviewing investment inventories and performing credit analyses.

Job Responsibilities

The scope of work includes:

- Assisting in reviewing economic data and trends
- Analyzing current market rates with a focus on interest rate structures and spreads
- Assisting in determining ongoing fixed income strategy as part of Fixed Income team
- Assisting in reviewing fixed income offerings and interacting with brokers
- Providing credit analyses of corporate and government issuers
- Analyzing characteristics and structure of fixed income portfolios and recommend/implement changes
- Preparing charts and analyses for client presentations and meetings
- Working on special fixed income projects

Qualifications

- Demonstrated interest in investments and capital markets, fulfilled by some, or all, of the following:
 - Bachelor's degree in a related subject area with a record of high academic achievement
 - Knowledge/experience in investment management (e.g., RIA, bank, or trust company)
 - CFA or MBA preferred
 - Fixed income experience required (minimum 5 years)
- Strong quantitative, analytical, and communication skills
- Proficiency in Bloomberg, Thomson Reuters Eikon, RedBlack, and Orion Advisor Services desirable; strong technology skills required
- A demonstrated ability to work both independently and collaboratively as part of a team
- An ability to assign priorities to multiple concurrent, competing requests while ensuring accuracy, completeness, and timeliness
- Candidates must be eligible to work in the United States without sponsorship or restrictions

All applications must include a resume and cover letter. Please send this information to Gretchen Lee via email at GLee@cliffordswan.com.