

Associate | Portfolio Management

Location: Westlake Village, CA (Los Angeles)

Job Type: Permanent Full Time

Area of Interest: Private Client/Portfolio Management

Company Description

One Capital Management, LLC ("OCM") is a leading global wealth management firm that offers diversified wealth management services to individuals and private clients in major markets around the world. Through its integrated wealth management platform, OCM is well-positioned to tailor wealth management solutions for its clients. OCM also offers a platform of wealth management services for private client advisors with other firms and investment companies.

Position Description

The Portfolio Management Group of One Capital Management is in search of an Associate to join the Portfolio Management team to support the Senior Portfolio Management team and Investment Policy Group, in the translation of portfolio strategy across client accounts. The Associate is responsible for optimizing portfolios and initiating equity and fixed income trades based on guidance from the research teams, portfolio targets, and account management guidelines. Associates are responsible for ensuring that portfolio strategy is applied to individual client accounts by demonstrating a deep understanding of investment services and operational policies and procedures.

Specific responsibilities may include but not limited to:

- Implementing investment decisions for individual client accounts.
- Day to Day monitoring of equity, fixed income, and cash positions in the accounts.
- Investing new accounts, reviewing, applying client guidelines, addressing client requests, and managing client cash flows.
- Liaising with other departments internally, Senior Portfolio Managers, Compliance, Sales/Marketing, Trading, and Investment Operations.
- Utilizing various quantitative portfolio management tools, including portfolio optimization techniques.
- Project based initiatives for Global Portfolio Management group, Senior Portfolio Managers, research teams, and clients.

Job Requirements

The candidate must have a bachelor's degree. The candidate should have 1-2 years of experience, in a professional capacity; industry experience is preferred but not required. He/she should have strong analytical ability with solid quantitative skills. Proven problem-solving skills are essential. Strong attention to detail with the ability to multitask and prioritize in a deadline driven environment required. He/she should also possess strong communication skills (both written and verbal) and interpersonal skills. He/she must be comfortable working independently while also collaborating as part of a team. College degree required.

Compensation & Benefits

- Salary: \$64,480.00 - \$70,000.00
- Bonus
- Flexible and responsible unlimited paid time off (PTO).
- Participation and coverage under the company Health care plan.
- Participation in the Company 401(k) Plan.
- Reimbursement up to \$75.00 a month for membership fees paid as part of company Wellness Program.
- Company sponsorship in continuing education.

Interested applicants should submit their resume to hiring@onecapital.com