Example of Portfolio Planner Job Description

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Our company is hiring for a portfolio planner. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

Responsibilities for portfolio planner

- Work in partnership with broader Workplace Services team to deliver workplace solutions to the business users
- Work on ad hoc projects, and activities which move the overall team and greater Workplace Services' agenda forward
- Evaluate planned portfolio reduction projects to validate financial assumptions and feasibility of implementation from a transaction execution, project execution, and workplace strategy standpoint
- Partner with project management to identify and mitigate risks to timely project implementation with particular focus on changes in client strategic direction and change management risks
- Develop alternative scenarios and new scenarios to drive incremental savings and present and support presentation to clients for decision
- Spearhead sensitivity analysis to illustrate the potential impact of a shift in assumptions on savings outcomes and/or portfolio performance metrics
- Develop formal client presentations on strategic opportunities, risks, and progress and assist in presenting to senior leaders both internally and in client presentations
- Package portfolio performance metrics into executive presentations and dashboards
- Package actual and forecasted Savings results in executive presentations and dashboards
- Analyze current and forecasted portfolio metrics and evaluate against

Qualifications for portfolio planner

- Some basic written and spoken English skill preferred
- The Financial Planner/Assistant Portfolio Manager position located in Memphis, TN will support the Private Wealth Division's Financial Advising team in the administration and investment management of over $200MM in AUM
- Develop and implements financial plans for individuals, businesses, and organizations, utilizing knowledge of tax and investment strategies, securities, insurance, pension plans, and real estate
- Assist clients, deliver quality plans and help coordinate enterprise certified financial planners
- 3-5 years investment management or related experience
- Bachelors degree with a major in finance or economics or statistics/mathematics