**Fixed Income SMA Portfolio Manager Job Description**

**Position Summary**

This role offers a unique opportunity for a skilled and entrepreneurial portfolio manager to join an innovative investment team at a growing financial services firm driven by technology-enabled investment management. Leveraging portfolio management expertise across a range of municipal and cash management investment strategies, the portfolio manager will play a key role in the firm's proprietary investment process while gaining valuable buy-side exposure and making a measurable impact. Responsibilities include the daily management of separately managed account (SMA) portfolios.

**Primary Responsibilities**

* Contribute to developing, communicating, and executing investment strategies
* Execute bond trades and allocate block trades to client accounts firm-wide
* Oversee and implement a comprehensive cash management program
* Conduct account reviews to identify portfolio needs or yield enhancement opportunities
* Generate and clearly articulate actionable investment ideas
* Understand and communicate sources of relative performance and attribution
* Investigate and resolve transaction settlement issues promptly
* Discuss portfolio strategy, performance, and market developments with clients and internal teams
* Develop and build relationships with brokers
* Assist in creating market commentaries and portfolio updates to support sales and marketing efforts

**Qualifications**

Education

* Bachelor’s degree required, Master’s degree preferred.
* CFA designation or progress towards the designation is a plus.

Professional Experience

* 2 - 5 years of relevant professional experience, knowledge of fixed income investing with emphasis on municipal bonds.
* 2+ years of direct municipal bond portfolio management experience.

Required Attributes

* Working knowledge of municipal bond markets and deep understanding of municipal bond portfolio management/trading including but not limited to market nuances, supply/demand dynamics, credit spreads & credit quality, relative value trading, taxation, etc.
* Thorough understanding of factors that drive investment performance
* Excellent verbal and written communication skills, with the capability to influence at all organizational levels
* Strong written and verbal communication skills
* Diligent attention to detail
* Exceptional problem recognition and resolution skills
* Ability to work independently and effectively multi-task across responsibilities

Ideal Attributes

* Experience trading municipal bonds
* Thorough understanding of the municipal bond market, including the ability to identify relative value across the yield curve
* Proactive, with an eye for what matters
* Ability to get things done quickly through agile problem-solving, perseverance, and effective communication

**Location**

San Diego, CA or Remote

**Company Information**

Presint Asset Management LLC is a premier investment firm specializing in customized, high-grade municipal bond investment solutions through separately managed accounts. Founded in 2024, our mission is to put the 'bond' back in municipal bond management by delivering bespoke, tax-efficient SMA solutions that are as personalized as our service. Driven by an innovative spirit, we are at the forefront of municipal investing – providing capital preservation with integrity and delivering performance powered by advanced research and proprietary technology, with an elevated investment experience for high-net-worth and ultra-high-net-worth individuals and families.

We are an Equal Opportunity Employer, dedicated to providing equal employment opportunities to all qualified individuals regardless of legally protected characteristics like race, nationality, gender, religion, or age. We ensure fairness in hiring, compensation, promotions, benefits, and all aspects of employment. We value diversity as a vital part of our culture, enhancing client service and driving success. To thrive, we strive to create an inclusive environment that embraces differences and encourages diverse perspectives.

Submit resumes to [shandi@presint.com](mailto:shandi@presint.com).