TRUXTON

WEALTH · FAMILY OFFICE · BANKING

Portfolio Analyst

FULL-TIME • TRUXTON WEALTH • NASHVILLE, TN

WHO WE ARE

Truxton Trust Company is a provider of private banking, wealth management, trust, capital markets, and family office services for wealthy individuals, their families and their business interests. Serving clients across the world, Truxton's vastly experienced team of professionals provides customized solutions to its clients' complex financial needs. Founded in 2004 in Nashville, Tennessee, Truxton Trust upholds its original guiding principle: do the right thing. Truxton Trust Company is a subsidiary of financial holding company, Truxton Corporation (OTCPK: TRUX).

MISSION STATEMENT

To do the right thing every day, putting our clients' interests first, with distinctive, comprehensive financial solutions that protect and promote client prosperity and quality of life.

WHAT WE OFFER

- 401k + company match
- Medical, life, dental, vision insurance
- Paid federal holidays and vacation
- Employee assistance program (EAP)
- Support towards continued learning and industry certifications

WHY YOU SHOULD WORK HERE

- Truxton is a highly profitable and growing company that has been recognized by American Banker as the 13th best community bank (top-ranking TN bank) based on 3-year ROAE
- Opportunities to grow your expertise, take on new challenges, and gain exposure to a wide range of sophisticated work
- Because we are a smaller company, you will have the opportunity to chart your own course and contribute to initiatives that go beyond your job title
- Opportunities for incentive bonuses through new business referral

CONTACT

- careers@truxtontrust.com
- 615-515-1700
- 20 Burton Hills Blvd, Suite 200
  Nashville, TN 37215

APPLY NOW

THE ROLE

The Portfolio Analyst position within Truxton Wealth is designed to prepare promising young professionals for a career in wealth management. The position will support all aspects of Truxton's client communications and wealth management services. The role is designed to support many aspects of our investment program; however, the primary initial responsibility will be the organization and creation of client presentations. Additionally, Portfolio Analysts will provide analyses and client service to our prospective and existing clients. We are looking for candidates who are flexible, eager to learn, and have a desire to serve clients. We work as a team and expect the Portfolio Analyst to find ways to contribute and seek opportunities to help. New client relationships are critical to the future success of Truxton Trust; therefore, we expect all employees to be advocates for Truxton and to seek new relationships and deepen existing relationships to the extent of his or her ability.

WHAT YOU WILL BE DOING

- Creating accurate and timely client review presentations for client meetings that occur at least once a year for each client
- Developing a deep understanding of our Trust accounting system, FactSet, Bloomberg, Morningstar and any future software platforms
- Maintaining and developing new presentation templates and exhibits that reflect quality, efficiency and aesthetics
- Generating new business presentations for Wealth teams working closely with Portfolio Managers and Wealth Advisors
- Supporting the Investment team with regular reports, analytical projects and investment input
- Maintaining the weekly Investment Committee meeting minutes and ensuring their timely incorporation into the Administrative and Investment Review Committee (AIRC) meeting on a monthly basis
- Assisting the Wealth team with trading activities (stocks, bonds, mutual funds, ETF's, etc.) from trade execution to settlement ensuring best execution and adherence with WMS protocols
- Developing strong knowledge and command of current and anticipated capital market conditions
- Understanding Truxton Wealth investment objectives and attendant asset allocation ranges
- Working within established Truxton Wealth policies, procedures and guidelines

WHAT WE ARE LOOKING FOR

Attributes and Abilities

- Genuine interest in pursuing a career in investment management
- General understanding of investing, accounting and the capital markets
- Able to seamlessly toggle between independent work and collaborating with a team dynamic
- Detail-oriented, organized, and able to handle multiple tasks in a timely fashion

Experience and Skills

- Coursework or internship experience related to Finance, Accounting, or Investing
- Proficient in Microsoft Office (Excel, PowerPoint, Word)

Education and Designations

- Bachelor's Degree in Finance, Accounting, or Economics preferred
- Pursuit of Advanced Degree or Professional Designation preferred