# FINANCIAL MANAGER

## The Position

Financial Managers form the foundation of our advisory work by applying accounting skills, financial analysis, research, and communication skills to serve clients and co-workers.

## Key Areas of Responsibility

Investment portfolio accounting.

Preparing cash flow forecasts to illustrate client portfolio withdrawal rates.

Preparing client portfolio review materials and responding to client questions.

Communicating with client tax advisers and their portfolio custodian.

Executing online investment transactions initiated by the team's investment advisers.

Analysis of equity and fixed income investments, with an emphasis on free cash flow yields of publicly traded companies.

Potential involvement with information security and regulatory compliance.

## Your Professional Qualifications

Undergraduate degree required – Finance, Accounting, Business Administration or Liberal Arts preferred.

Accounting and/or tax experience.

Professional designation of CPA beneficial.

Must maintain a high level of confidentiality (subject to signed confidentiality agreement).

Exceptional analytical and communication skills.

Strong orientation to detail, organization, and process.

Knowledge of Microsoft Word and Excel required.

Experience with PortfolioCenter or Advent Portfolio Management software is beneficial.

## About the Firm

Murphy Pohlad Asset Management, located in Eden Prairie, is an independent registered investment advisory firm, managing tailored investment portfolios.

Our mission and organizational design is focused on the efficient delivery of services designed to meet client objectives. Our clients consist of high net worth families and individuals.

Our advisory services include integrated cash flow analysis illustrating sustainable portfolio withdrawal rates, portfolio accounting that integrates each component of a client's investment portfolio, charitable gifting strategies, advice on corporate stock options and deferred compensation arrangements and management of concentrated stock positions.

Investment portfolios are designed to meet the objectives of each individual client.

## Your Personal Attributes

Client Focused – You are passionate about serving clients and participating in meeting their advisory needs.

Communication - You are a willing listener and a learner.  You communicate well in writing or verbally.

Problem solving - You are attentive to detail and enjoy solving problems.

Team Player – You enjoy being a part of a team and contributing to results.

Curiosity - You have an intrinsic interest in how things work combined with a drive to efficiently understand context.

Integrity - You believe in integrity – always.

Balance – Your work is an important source of fulfillment and you have interests you enjoy outside of work.

Mindful Determination - Your successes have resulted from thinking, planning, disciplined decision making, hard work, and focused execution.

Multi-tasking – You thrive with the challenge of having a full list of projects to complete and you effectively triage, communicate and rebalance as your day develops.

## We Offer

A collaborative platform as a foundation to build your skills.

Analytical tools and resources to support investment analysis and portfolio management.

Personal development growth opportunities, including a path to becoming an investment adviser and a long term opportunity for management and leadership.

An inclusive work environment where every person is given the encouragement, support, and opportunity to be successful.

A comprehensive benefits package.

## How to Apply

Apply via email to employment@murphyllc.com with a resume and a cover letter attached.

### Our Values

Relationships – Building win-win relationships with all constituencies.

Integrity – Doing what we say we will do.

Respect – Treating our clients, co-workers, and vendors with the utmost respect.

Communication – Connecting directly with clients in a pro-active and responsive manner.