
Job Description

Job title:	Portfolio Manager (PM)
Location:	New York, NY / West Chester, PA
Company:	Resolution Life Services US Inc. (RLUS)
Reports To:	Head of Portfolio Management

POSITION SUMMARY:

The Portfolio Manager (PM) will primarily support the Portfolio Management team's responsibilities in managing Resolution Life US's (RLUS) investments across the asset class spectrum. As an Insurance company, the RLUS portfolio will consist of a diversified mix of capital-efficient investments which are optimized from time-to-time for the best risk adjusted return outcome. RLUS leverages relationships with third-party investment managers to invest in specific asset classes. It is the primary responsibility of the Portfolio Management team to execute the investment strategy through manager oversight and selection of new managers. The Portfolio Management team will work in combination with the Risk and Strategy team to set portfolio construction, asset allocation, asset class relative value, and formulate market views.

The PM will have the opportunity to gain exposure to investments across the portfolio and will also be involved in other aspects of the team's activities including risk management, performance analysis, reporting, and the continuous build-out of the team's operating infrastructure. Additionally, the PM will have the opportunity to have interactions with internal stakeholders as well including team members from the actuarial, finance, legal, and operations groups.

The RLUS Investment Team is a lean, flat organization that requires all individuals to contribute in order to generate the best outcome for the Group. The environment is fast paced, flexible, and will allow the individual to gain exposure to all aspects of the investment process. The RLUS business expects to grow significantly in the coming years and the team will evolve along with it. The individual for this role will be expected to be a team-player, willing to learn, and develop her/his skills with a positive attitude and a high degree of self-motivation.

KEY ACCOUNTABILITIES:

- **Manager oversight**
 - Will assist the Head of Portfolio Management in monitoring specific investment mandates and communicating internally on the changing risk/return characteristics of the asset class and securities held by RLUS in the portfolio
 - Participate in monthly/quarterly portfolio review meetings as well as serve as the point person for more ad-hoc questions originating from within RLUS or from the third-party manager
 - Review and recommend investment directions and instructions to be provided to third-party investment managers under the supervision of the Head of Portfolio Management

 - **New Investment Implementation**
 - Work with the Head of Portfolio Management and CIO to implement new asset class investments in the portfolio, considering both investment and operational aspects of a proposed mandate
 - Conduct Requests for Proposal (RFP) processes in order to properly and completely due diligence investment manager offerings and make a recommendation based on the outcome of the process
 - Prepare due diligence reports and present proposals to various RLUS Committees
 - Research investment strategies and follow new developments which may be beneficial to
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- the RLUS portfolio
- **Investment Team support**
 - Assist the broader Investment Team in other areas including Investment Strategy and Risk as well as Investment Operations
 - Provide input to the team's discussions on an ongoing basis with regards to potential opportunities or developing risks in the markets based on individual research
 - Assist in developing internal presentations for various Committee meetings, investment proposals, or other purposes as needed

EDUCATION

- Bachelor's Degree in Finance, Economics, or related area
- Certified Financial Analyst (CFA) is a plus

EXPERIENCE

- 7-10 years' experience in an investments-related role
- Experience in an Insurance company environment preferred

SKILLS

- Strong analytical and problem-solving skills
 - Excellent verbal and written communication skills
 - Ability to multi-task, prioritize, and pivot efficiently
 - Excellent organization and interpersonal skills
 - Proficiency with Excel, PowerPoint, and Bloomberg
 - Knowledge of MS Power tools preferred
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