CAREERS

# Portfolio Manager

FULL-TIME · $130,000 – $150,000

The investment seat at an integrated firm — public portfolios, private-market and real asset diligence, and the proprietary models underneath both — for clients whose wealth and whose businesses are the same conversation.

ABOUT KFG

## An integrated firm built around business owners.

Founded in 1998, Keller Financial Group is an integrated advisory firm built around business owners. We bring bookkeeping, tax, financial planning, investments, and business advisory together under one roof, then serve owners across the full ownership lifecycle: building the company, preparing for and navigating a transition, and stewarding the wealth and legacy that follow.

Now in its second generation of ownership, KFG is at an important inflection point. We have proven an integrated advisory model that combines the strategic depth of experienced advisors with the focus, continuity, and care of a close-knit, operator-minded team. We are now ready to scale that model thoughtfully, expanding our capacity while preserving the quality, judgment, and long-term relationships that make it work. Investment management is where much of that integration is tested, because our clients' portfolios have to account for a concentrated business, an eventual sale, and the tax consequences of both.

ABOUT THE ROLE

## Own the investment function.

KFG is seeking a Portfolio Manager to lead the investment side of an integrated advisory firm. You will manage public market portfolios, run diligence on private-market and real asset opportunities, and build and maintain the proprietary models that support both.

The clients are high-net-worth families and multi-family-office relationships, many of them business owners at some point along the arc of building, selling, or having sold a company. That changes the work. A portfolio here has to be constructed against a concentrated illiquid position, a liquidity event with a date attached, or a household newly living on the proceeds — and it has to be coordinated with the tax and planning work happening down the hall.

This is a hands-on role with real authority. You will not be implementing a model portfolio handed down from a committee elsewhere, and you will not be selling anything. You will be the person responsible for whether our investment advice is sound, and you will have the standing to say when an opportunity is not worth taking.

WHAT YOU WILL HELP BUILD

## Four things we are building, with you.

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| 01 | An investment process rigorous enough to defend and specific enough to reflect each family's real cash needs, tax position, and concentration risk. |
| 02 | A repeatable diligence framework for private markets and real assets, so opportunities get a consistent, independent read rather than an ad hoc one. |
| 03 | Proprietary models — allocation, cash-flow, scenario, and manager evaluation — that are maintained rather than built once and forgotten. |
| 04 | An investment function integrated with tax and planning, so portfolio decisions account for the return and the after-tax outcome at the same time. |

KEY RESPONSIBILITIES

## The work itself.

### Portfolio Management

- Construct and manage public market portfolios across equity, fixed income, and alternatives for high-net-worth and multi-family-office clients.
- Set and maintain asset allocation against each client's liquidity needs, time horizon, tax position, and concentration exposure.
- Manage rebalancing, tax-loss harvesting, and the trading calendar, coordinating with the tax team on realized-gain consequences.
- Address concentrated stock, restricted positions, and post-liquidity portfolios, including the transition from a single asset to a diversified one.
- Monitor performance, attribution, and risk, and be able to explain all three in plain language.

### Investment Due Diligence

- Lead diligence on private-market and real asset opportunities, including real estate, private equity and credit, and direct deals clients bring to us.
- Evaluate managers, funds, and sponsors on strategy, track record, terms, fee structure, and alignment.
- Write clear, decision-ready investment memoranda, including the recommendation not to proceed.
- Maintain ongoing monitoring of approved managers and positions, and raise it when a thesis stops holding.

### Research & Modeling

- Build and maintain proprietary models for allocation, scenario analysis, cash flow, and manager evaluation.
- Keep capital market assumptions current and document the reasoning behind them.
- Translate research into investment policy, guidelines, and recommendations the advisory team can act on.
- Produce the investment content behind client reviews, IPS documents, and committee materials.

### Client & Team Work

- Join client meetings as the investment voice, particularly for complex portfolios and private-market decisions.
- Work with the planning team so the portfolio serves the plan rather than running alongside it.
- Work with the tax team on asset location, gain realization, and the tax consequences of portfolio changes.
- Support trading, reporting, billing, and account operations on the custodial and platform side.

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WHAT WE ARE LOOKING FOR

## Experience and disposition.

- Substantial experience managing public market investment portfolios in a fiduciary capacity.
- Experience serving high-net-worth or multi-family-office clients and the complexity that comes with them.
- Familiarity with private markets — real estate, private equity and credit, and direct investments — and the judgment to evaluate them independently.
- Demonstrated ability to build and maintain sophisticated financial models rather than operate someone else's.
- Strong writing. Investment memoranda and client explanations are a large share of the output.
- The independence to reach an unpopular conclusion and the clarity to explain why.
- Comfort working across tax and planning rather than treating investments as a self-contained discipline.

**Credentials and platforms.** The CFA charter is required. Familiarity with the Schwab and AssetMark platforms is beneficial, as is experience with portfolio accounting, reporting, and trading systems.

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COMPENSATION

## $130,000 – $150,000.

Depending on experience and credentials, plus health, dental, and vision insurance, a retirement plan with company match, and 20 days of paid time off. You will also have direct access to the firm's senior advisors, hands-on exposure to complicated business-owner issues, and the opportunity to influence the systems and processes the firm uses as it grows.

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WHY THIS ROLE IS DIFFERENT

## Five reasons this seat is different.

### You own the investment view.

There is no model portfolio arriving from a home office and no committee elsewhere to defer to. The investment process here is what you build it to be, and the judgment is genuinely yours.

### Diligence with teeth.

Clients bring us real estate deals, fund offerings, and direct investments and want a straight answer. A meaningful part of this job is telling a family that the opportunity in front of them is not worth it — and being the reason they are glad they asked.

### The tax picture is not someone else's problem.

Asset location, gain realization, and entity structure sit with colleagues a few steps away. You will manage to after-tax outcomes, which is what the client actually experiences.

### Portfolios attached to real events.

A business sale closing in eighteen months, a concentrated position that is most of a family's net worth, a household learning to live on invested capital. The problems are specific and consequential.

### Boutique standing, senior access.

You will be the firm's investment authority, in the client meeting, close to the decisions about how the practice grows. No queue, no politics, no layer between you and the work.

WHO WILL THRIVE HERE

## Senior judgment, hands on the work.

This role fits an experienced investor who wants the authority of a senior seat without losing contact with the actual analysis. At a firm our size you will build the model, run the diligence, and present the recommendation yourself — that is the appeal, and it is also the requirement.

It should also appeal to someone who finds the integrated picture more interesting than the pure investment problem. The best answer for one of our clients is often shaped as much by their entity structure or their exit timeline as by the market.

**Who this role is not for.** This is not a role for someone who wants to delegate the analysis and manage a team of analysts — the team is not there yet, and building it is later work. It is also not a fit for a product or distribution seat, or for anyone who would rather work purely in public markets and leave the private side to somebody else.

HOW TO APPLY

## Send us a note.

Email your resume to info@kellercpa.com, along with a few sentences about what you are looking for. Every note reaches a person here, and we answer.