

## Associate | Portfolio Management

**Location:** Westlake Village, CA (Los Angeles)

**Job Type:** Full Time

**Area of Interest:** Private Client | Portfolio Management

### Company Description

One Capital Management, LLC (“OCM”) is a leading global wealth management firm that offers diversified wealth management services to individuals and private clients in major global markets. Through its integrated wealth management platform, OCM is well-positioned to tailor wealth management solutions for its clients. OCM also offers a wealth management services platform for private client advisors with other firms and investment companies.

### Position Description

The Associate is responsible for optimizing portfolios and initiating equity and fixed-income trades based on guidance from the research teams, portfolio targets, and account management guidelines. Associates ensure that portfolio strategy is applied to individual client accounts by demonstrating a deep understanding of investment services and operational policies and procedures.

Essential responsibilities include but are not limited to:

- Implementing investment decisions for individual client accounts.
- Day to Day monitoring the accounts' equity, fixed income, and cash positions.
- Investing new accounts, reviewing, applying client guidelines, addressing client requests, and managing client cash flows.
- Liaising with other departments internally, including senior portfolio managers, compliance, sales/marketing, trading, and investment operations.
- Utilizing various quantitative portfolio management tools, including portfolio optimization techniques.
- Project-based initiatives for Global Portfolio Management group, Senior Portfolio Managers, research teams, and clients.

### Job Requirements

The candidate must have a bachelor's degree. 2 years' experience in a relevant professional capacity preferred. He or she is required to have strong analytical ability with solid quantitative skills. Proven problem-solving skills are essential. Strong attention to detail with the ability to multitask and prioritize in a deadline-driven environment required. He or she should also possess effective communication skills (both written and verbal) and interpersonal skills. He or she must be comfortable working independently while collaborating as a team.

### Compensation & Benefits

- Salary: \$69,000 - \$75,000
- Performance Based Bonus
- Flexible and responsible paid time off (PTO).
- Participation and coverage under the company Health care plan.
- Participation in the company 401(k) Plan.
- Reimbursement of up to \$75 monthly for membership fees paid as part of the company Wellness Program.
- Company sponsorship in continuing education.

Interested applicants should submit their resume to [hire@onecapital.com](mailto:hire@onecapital.com).