



CAMPBELL NEWMAN

## ASSOCIATE PORTFOLIO MANAGER/ANALYST JOB DESCRIPTION

### SUMMARY

Campbell Newman (CN) is a boutique investment management firm serving institutional and high net worth clients nationally. Founded in 1977, the firm's culture is built on five core values – client focused, stewardship, transparency, integrity and teamwork. CN currently offers two products – Large Cap Dividend Growth and Small Cap Growth. Both strategies feature high-quality biased, high conviction portfolios that utilize the same bottom-up driven research process. They are differentiated by their investment philosophies that translate into the screening criteria used to define their research universes, the indices to which their investment performance is benchmarked and the characteristics of the portfolios.

CN builds portfolios through bottom-up stock selection using a team-based, flat decision-making structure. The investment team currently consists of three time-tested portfolio managers/analysts that have worked together at CN for over 15 years. The Campbell Newman competitive advantage is the team's "judgment backed by experience": Reg FD leveled the playing field so that everyone gets the same information at the same time. It is how the information is processed and used to make decisions that makes the difference between success and failure. Accordingly, the investment team at Campbell Newman is distinguished by its independent thought, flat decision-making style and decades of experience in the research and decision-making process.

Campbell Newman is seeking to add to its investment team with an Associate PM/Analyst in their Milwaukee, Wisconsin office.

### CANDIDATE RESPONSIBILITIES

The successful candidate will be a self-starter that is excited about joining an established team at a growing firm. Reporting to the Director of Research, the candidate will be required to:

- Perform independent equity research on current holdings as well as new purchase ideas consistent with the firm's bottom-up investment process and present work to the investment team
- Assume coverage responsibility for specific portfolio holdings
- Participate in weekly research meetings and portfolio construction discussions
- Prepare written reports for internal and external use
- Become proficient using Zack's Research System
- Work with client service and marketing staff to generate information for quarterly reporting and other projects
- Aid in client service and business development efforts by interfacing with clients, consultants and other prospects



## **CANDIDATE REQUIREMENTS**

The successful candidate will be of like mind with CN's team philosophically and be able to demonstrate acumen as a stock picker. The characteristics of an ideal candidate:

- Shares CN's investment philosophies
- 7 – 10 years of experience as equity analyst with a focus on Large Cap Growth or Large Cap Core
- A team player that believes in the power of collaborative work to make decisions and build relationships
- Personal and professional integrity
- Excellent written, verbal and presentation skills
- Outstanding organizational and time management skills
- Excellent computer skills
- CFA or MBA required

## **COMPENSATION**

Compensation will consist of a base salary commensurate with experience and the opportunity to participate in the quarterly bonus pool for investment professionals. Additional benefits include competitive health, profit-sharing and 401(k) plans.

## **CONTACT**

If interested, please forward resume to [careers@campbellnewman.com](mailto:careers@campbellnewman.com).