GENERATION
IACP

Portfolio Manager

We're looking for Portfolio Managers (or Investment Advisors interested in becoming PMs) with track records of success and established books of business. As part of our Portfolio Management and Client Relations team, you will help clients achieve their goals by utilizing Generation IACP's internal investment capabilities.

At Generation, you'll have the freedom and flexibility to expand your business the best way you see fit. You will enjoy autonomy to build and grow your client portfolios through dedicated relationship management, investment results, and exceptional client service. Support from our operations and investment management teams means you can focus on client service and growing your business. As well, your input will be valued as you contribute to our marketing and branding strategies, product development, and business building initiatives.

Our entrepreneurial culture provides opportunities to contribute to our firm beyond managing client portfolios. You have the opportunity to establish and maintain mutually beneficial relationships with our Capital Advisory team, assisting corporate issuers reach their business objectives.

Please submit your resume to careers@GenerationIACP.com.

What We Offer

- Freedom and flexibility to grow your business the best way you see fit
- Support from internal investment management team
- Dedicated operations team to lighten your administrative burden
- Partner in success with unlimited earning potential
- Opportunities to contribute beyond managing client portfolios

Attributes We Value

- Self-motivated with integrity, empathy, and a commitment to excellence
- Strong written and verbal communication skills
- Ability to work collaboratively with fellow investment professionals
- Understanding of value investing, alternative investments, and income strategies
- Interest in new product development, brand building initiatives, marketing strategies
- CFA (Level I) or CIM
- Minimum of $30 million in client assets

About Generation IACP

At Generation we help our clients achieve their goals through two distinct areas:

INVESTMENT ADVISORY
Provides discretionary managed accounts on behalf of high net worth individuals and institutions.

CAPITAL PARTNERS
Our Capital Partners team provides corporate clients with Issuer Trading Services to help issuers reach their next level of development and a full range of financing and advisory services.