Lowell Blake

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The Firm

Lowell, Blake & Associates, Inc. is an independent registered investment advisor firm based in Boston. We pride ourselves on our independent thinking, integrity, and personal approach to meeting our clients' needs. Our firm manages over $650 million in assets utilizing individual equities and individual fixed income. All our research is performed in-house. LBA has provided personalized financial services and support for individuals, families, nonprofits, and businesses since 1974.

Position Description

We are seeking a highly motivated professional to work with us as a portfolio manager and analyst. This role is portfolio management with direct client contact (50 percent) and analyst work (50 percent). The successful candidate will be assigned responsibility for a number of existing client relationships, and will support the firm's other important relationships. The analyst component of this position includes research responsibility as part of the investment research department. The firm utilizes a combination of top-down macro analysis and bottom-up fundamental research. A typical client portfolio contains 35-40 individual securities. The position will entail creating customized portfolios using both equities and fixed income.

The ideal candidate will have excellent client relationship skills, strong quantitative abilities, demonstrate attention to detail, and possess a solid financial planning or investment background. He or she must also be a team player with a curious mind and should be able to convey investment themes and thoughts clearly and concisely through writing. A professional designation (or work toward a designation) is a plus. The portfolio manager/analyst will have the opportunity to participate in new business presentations.

Primary Responsibilities and Duties

Portfolio Manager

- Executing portfolio management for a broad array of individual, family, non-profit, and trust portfolios, each designed to align a client's short- and long-term goals. We do not use model accounts; however, we do use the same equity and fixed income names to design portfolios
- Managing client relationships in coordination with the client service team
- Creating, maintaining, and executing financial plans/strategies
- Participating in weekly firm-wide client account review
- Maintaining client relationships by initiating meetings that address estate and financial planning issues as well as portfolio management

Analyst

- Actively participating in bi-monthly research meetings by introducing (1) new ideas for investment and (2) geopolitical thoughts/views that are relevant to our research work
- Generating and updating client-friendly research reports
- Contributing to the LBA newsletter and monthly communication
- Trading responsibilities, when necessary, in support of the team

Desired Skills and Experience

- A minimum of five years of experience in research and/or portfolio management
- CFP, CFA, or master's degree in finance or business, or progress towards the same
- A dedication to the "client first" principles of the firm and uncompromising integrity
- Both analytical expertise and strong relationship-building abilities
- The ability to solve problems independently and seamlessly manage multiple roles
- Strong interpersonal skills that enable effective communication with a wide variety of people
- Excellent communication skills, both verbal and written
- The ability to work autonomously and to collaborate with a team
- Experience with high net worth clients and/or new business development is a plus

Compensation/Benefits

- Competitive salary with incentive bonus
- Medical
- Dental
- Basic life insurance and accidental death and dismemberment coverage
- Group short-term disability insurance
- Group long-term disability insurance
- Paid time off
- 401(k)