Client Portfolio Manager

Weitz | INVESTMENT MANAGEMENT

Reports to Vice President and Head of Sales
Located in Omaha, Nebraska

Reporting to the Vice President and Head of Sales, the Client Portfolio Manager (CPM) is responsible for representing the Weitz products (Weitz Funds series of mutual funds, separately managed accounts, and CIF line-up) to existing clients and prospects in conjunction with the enterprise sales and service teams. The CPM will support new investment product lines, as developed. Additionally, the CPM will work closely with the sales, marketing, and investment teams and is responsible for creating investment research, thought leadership, and content that supports broader sales and marketing initiatives.

Approximately 40% travel is required.

Essential Functions

- Presents product solutions at client, consultant, and advisor meetings in conjunction with Weitz sales teams
- Develops competitive analytics to support product solutions, including detailed competitor-by-competitor profiles to help position the Weitz products opposite competitors
- Supports the development of value propositions and selling strategies associated with product offerings
- Works closely with the marketing team to develop the overall presentation of products, thought leadership, and content
- Clearly articulates investment themes, portfolio trends, positioning, and attribution to various audiences, both external and internal
- Responsible for responding to client inquiries related to the Weitz products
- Attends portfolio management meetings to understand the decisions being made in the portfolios to better articulate investment thinking to clients
- Prepares analytics related to requests from advisors and consultants regarding the Weitz products
- Other duties as assigned based on company needs

Requirements

- Bachelor's degree in finance, economics, mathematics, or equivalent. Master's degree preferred
- CFA charter strongly preferred
- Series 6/7 and 63 required or must be able to obtain within 90 days of hire date
- At least five years of experience in a similar role preferred
- Demonstrated expertise in investment themes and trends, economic analysis, and manager research principles
- Experience with industry-standard investment research tools including FactSet, Bloomberg, Barclays, Morningstar, Lipper, or eVestment
- Motivated, self-starter individual that requires limited direct supervision
- Ability to multi-task with excellent attention to detail
- Ability to work collaboratively and effectively
- Advanced proficiency in MS Office, particularly Excel, and PowerPoint

Please apply by submitting resume to Kelly Kraft, Vice President and Head of Sales, by e-mail at careers@weitzinvestments.com.

We offer all employees excellent benefits including health care coverage and a qualified profit sharing plan. We also have an employee stock purchase plan. Compensation includes salary and bonus and will be commensurate with experience.

About Weitz Investment Management

Founded by value investor Wally Weitz in 1983, Weitz Investment Management, Inc. is a boutique, employee-owned asset management firm headquartered in Omaha, Nebraska. Over the past three decades, Weitz has leveraged its research-driven approach to capitalize on opportunities that arise out of market inefficiencies. Decisions are backed by thorough research, logical strategies, extensive debate and our team's personal commitment to long-term results. The Weitz team builds and manages concentrated, high-conviction, actively managed portfolios. Through bottom-up, proprietary research that emphasizes fundamentals, we focus on creating positive results over the long term. We offer a variety of options for investors with different goals and preferences, including equity and fixed income investment strategies.