

Position: Chief Investment Officer
Reports to: Chris Walters, Chris Myers, President/CEO
Client: Citizens Trust
Location: Pasadena, CA (Trust) Ontario, CA (Bank)
www.cbbank.com

Client:

Citizens Trust is an investment boutique with Trust Capacity that is positioned to grow. Citizens Trust has \$2.5 billion in assets, with over \$800 million being actively managed by three portfolio managers. There are 45 Business Financial Centers from Stockton to Laguna Beach with 28 people total.

Job Description:

- Manage all research initiatives and production.
- Responsibility for Process, Policy, and Results, for internal Equity and Fixed Income portfolios.
- External manager selection and oversight.
- Evaluation, development and implementation of investment strategies: Investment Policy Committee?
- Develop and Monitor asset allocation guidelines for the department.
- Management of all investment officers and staff.
- Evaluate the skills and attitudes of current team and re-directing as necessary.
- Create new investment products

Skills and Qualifications:

- Undergraduate degree mandatory; CFA and / or MBA desirable.
- Ten years in investment environment with expertise in both equities and fixed income markets.
- Professionally motivated to take authority that's given to impact change in a staid environment.
- Desire to be a partner in growing a significant investment organization.
- Excellent written and verbal communication skills.
- Portfolio management in a sales-driven environment or as Research leader or as Investment Strategist.
- Investment policy committee experience or responsibility for investment policy and guidelines.
- Grasp of general investment and economic subjects, communicating this knowledge and information to a diverse group of clients and prospects.
- Ability to challenge the knowledge of professional staff with esoteric investment theories and strategies.
- Effective in a sales-focused and driven environment, and working with High Net Worth clients.
- Expertise working with Corporate Executives, Entrepreneurs, and Business Owners.
- Comfortable and effective communicating with the media, proactive in outreach with them.
- Manage the flexible investment architecture model employed by Citizens Trust.

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Compensation:

- Salary: \$150-250,000; Target is \$200,000. DOE.
- Incentive Compensation: 45%
- Health and Retirement Benefits
- Stock-Stock Options

INTERESTED IN LEARNING MORE? CONTACT STANTON CHASE

- **Pete Deragon, Director, Stanton Chase Financial Services, North America**
- (805) 783-0292 or (805) 440-9940 cell
- p.deragon@stantonchase.com

Please contact me to discuss the client's needs, and how this opportunity might fit in with your career goals.

ABOUT US: WHO IS STANTON CHASE?

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