



Portfolio Manager & Strategist



Located far from Wall Street in beautiful northwest Montana, Stack Financial Management has earned a reputation as one of America's premier investment advisors with over \$1.3 billion in assets under management for clients in 48 states. Over the past 26 years, we have built an established firm with national respect and recognition, and over a 97% client retention rate. We have accomplished this by hiring "the best of the best" in all facets of our business, and by focusing energy on putting our clients first, and creating a dynamic work environment. We are currently offering a challenging and rewarding career opportunity for the right professional to join our team as a **Portfolio Manager & Strategist**.

Responsibilities:

- Write and edit compelling content that can be leveraged across a variety of media for our clients and broader audiences
- Ensure consistency in the firm's voice, key messages, and editorial style across all communication channels and media
- Participate in business development, firm presentations, and special events
- Monitor and analyze economic releases, corporate earnings, and other market data
- Contribute to team decisions on portfolio strategy involving equity market research and security selection
- Assist in the preparation and execution of large block trades and periodic account rebalancing
- Communicate directly with current and prospective clients on an ongoing basis

Qualifications:

- 10+ years of experience in the financial industry with a focus on a risk management philosophy
- Possess a proven understanding of and passion for financial markets, economics, and monetary policy
- Exceptional written and oral communication skills
- Bachelor's degree required, and holds or is actively pursuing the CFA designation

SFM offers competitive compensation, a generous benefit package and retirement plan, along with the opportunity to work with talented people in a vibrant community with year-round outdoor recreation. If you are a self-motivated team player, eager to contribute your expertise and ideas to our organization, while enjoying the desirable quality of life offered in Whitefish, Montana, please visit our Careers page for more information and to apply online (www.stackfinancialmanagement.com/careers/) or mail your letter of application and resume to:

Stack Financial Management
625 Wisconsin Ave
Whitefish, MT 59937
(406)862-8000
careers@stackfinancialmanagement.com
Your inquiry will be kept strictly confidential



Why Whitefish?

Home of InvesTech Research & Stack Financial Management

“There’s a storybook town squeezed up against the 49th parallel. If you look east from within its borders, you’ll spot the soaring ruggedness of Glacier National Park. Look above and you’ll be dwarfed by Montana’s “Big Sky.” And a simple look in front of you will make you feel at home.”

– Huffington Post



Living and working in Whitefish is a fantastic opportunity for anyone who loves nature and the outdoors. Our office is located only 6 miles from Whitefish Mountain Resort, and just 40 minutes from Glacier National Park. Whitefish may be best known for skiing (with 3,000 acres of skiable terrain, 320 inches of average snowfall and a vertical drop of 2,353 feet); however, year-round recreational opportunities await. Whether hiking the 43 miles of trail offered by the Whitefish Trail system, enjoying heart pounding white water on the Middle Fork of the Flathead river, boating on Whitefish Lake, mountain biking at Whitefish Mountain Resort, or golfing one of the nine championship golf courses within 45 minutes of Whitefish, the possibilities are endless.

**Whitefish Named ‘Most Beautiful Town’
in Montana**

[Daily Inter Lake]

America’s Best Trail Towns: Whitefish, MT

[Backpacker Magazine]

The Best Small Towns in America

[Men’s Journal]

**2020’s Top Rated Western Ski
Resorts – #3 Whitefish**

[Ski Magazine]

**The Flathead Valley has been Named Among the
Top 50 Golf Destinations in the World**

[Golf Digest]

**One of America’s Most Incredible
Mountain Towns for Summer**

[Huffington Post]

Whitefish has more to offer than exhilarating outdoor recreation. Local schools are perennially ranked amongst the top school districts in the state. The valley is home to state-of-the-art healthcare facilities, with North Valley Hospital conveniently located in Whitefish along with dozens of specialty clinics, and Kalispell Regional Medical Center only 20 minutes away. Cultural opportunities abound as well, with world-class performances at the O’Shaughnessy Center and Whitefish Performing Arts Center, several art galleries with special exhibits on Whitefish Gallery Nights, and regular live music at downtown watering holes. For a full listing of annual events and more information, view the **Chamber of Commerce Community Guide**.



We urge you to visit the following websites to discover just a few of the cultural, recreational, and lifestyle opportunities available in Whitefish, Montana... and to see why we chose Whitefish as home:

Explore Whitefish – www.explorewhitefish.com

Whitefish Chamber of Commerce – www.whitefishchamber.org

Whitefish Mountain Resort – www.skiwhitefish.com

The Whitefish Trail – www.whitefishlegacy.org

Glacier National Park – www.nps.gov/glac