Sentinel Trust
Together, families prosper℠

Job Description

Job Title: Investment Strategist	Job Code:
Department: Investments	Classification: Exempt
Reports To: Chief Investment Officer	Date Originated: November 2021

Summary
Acts as a trusted resource for and in close partnership with the Chief Investment Officer to provide investment advisory services to a broad range of clients and construct the portfolios of the Sentinel Trust investment vehicles. Uses in-depth subject matter expertise to advise on and oversee family portfolios through the full cycle of the client's relationship with Sentinel Trust (business development, onboarding, ongoing management, trading, reporting, and off-boarding).

Essential Functions

1. Demonstrates an intellectual curiosity of the financial markets, tax management techniques, and estate planning principles, as well as develops an in-depth understanding of the Sentinel Trust investment vehicles, including strategic asset allocation, tactical allocation, vehicle-level positioning, managers, objectives, and performance.

2. Maintains financial data and narrative information about asset classes and investment vehicle portfolios.

3. Partners with the Senior Relationship Officers to provide comprehensive financial guidance to a broad range of clients, including but not limited to:
   - Deliver client asset allocations and performance.
   - Educate on the Sentinel Trust investment vehicles, current market conditions, market expectations and the economic outlook.
   - Respond to questions and lead investment discussions at scheduled client meetings, including the explanation of variances or underperformance.
   - Use strong communication skills tailored to a client's understanding in order to concisely discuss and recap complex ideas involving portfolio construction, performance, and attribution.
   - Represent a client's point of view in internal investment-related meetings and discussions.

4. Responds timely to and facilitates client-initiated direct-deal requests, in partnership with the Senior Relationship Officers and Chief Investment Officer in accordance with understanding the clients' motivations and expectations. Reviews client-directed investments, conducts investment and operational due diligence, and considers client-directed investments in the overall portfolio.

5. Directs portfolio investment and redemption activity. Thinks strategically about a client's portfolio and asset allocation, but also tactically, in order to scale into and out of the markets and rebalance thoughtfully.

6. Directly performs portfolio management for assigned asset classes and may assist the CIO with oversight of the work of Portfolio Manager(s). Responsibilities related to the construction and management of the Sentinel Trust investment strategies include:
   - Research and analysis at both the security and manager level.
   - Building an expansive network comprised of fund managers, peers, and consultants in order to source unique investment opportunities and stay abreast of best practices and industry trends.
   - Conducting and reviewing initial and on-going due diligence to assist in selection and retention of investment managers.
   - Preparing and reviewing periodic quantitatively-based reports on existing and prospective managers' performance.
   - Identifying and selecting the holdings, managers and equity market factors that best satisfy the vehicle's stated objective within stated constraints.
   - Working with others to design and maintain proprietary spreadsheets and database models.

7. Develops and presents information, including tear sheets and in-depth reviews, to the Sentinel Trust Company Investment Committee.

8. Works effectively with Client Service, Investments, and Operations to ensure efficient workflows, continual process improvement, and maximization of resources firm-wide by:
   - Providing detail to Investment Operations about objectives to give context to requests for updating existing or generating new asset allocations.
   - Drafting other investment-related emails or talking points for the Senior Relationship Officers, as requested.
   - Maintaining deliverables in the CRM system, documenting issues and any updates real-time.
   - Documenting each client call with an email to the Archive email address and the Senior Relationship Officer copied.

9. Acts proactively and with a strong sense of fiduciary duty to deliver financial and non-financial alpha to Sentinel Trust clients.

10. Provides market research, presents detailed and appropriately-supported recommendations, and ensures timely implementation for new investment products and strategies.

11. Performs analytic research in a variety of general economic and investment areas on an as-needed basis for the Senior Relationship Officers or the Chief Investment Officer.

12. Develops expertise in investment software products.

13. Fosters positive employee relations and champions the Firm's strategic priorities, objectives, and policies.

Supervision of Others
Does not have direct supervision of others.

Minimum Position Requirements
Education / Experience / Technical Skills Bachelor's degree. CFA designation required. CFP® a positive. 10+ year's related work experience. Proficient Microsoft Office software skills, including advanced financial modeling abilities in Excel, and Adobe Acrobat skills **Competencies / Skills** **Adaptability** – adapts to change and different ways of doing things quickly and positively; addresses setbacks or ambiguity; deals effectively with a variety of people and situations. **Build Relationships** -- builds and maintains relationships that support and improve personal / team effectiveness; cooperates and works with others across departments to achieve goals; treats others with dignity and respect and maintains a friendly demeanor; values the contributions of others. **Client Focus** – focuses efforts on discovering and meeting clients stated or unstated needs and expectations. Recognizes that the client relationship is based on the client's trust, confidence, and reliance on Sentinel Trust to exercise discretion and expertise in acting for the client. **Communication** – expresses complex ideas effectively whether verbally or in writing; appropriately adapts message, style and tone to accommodate the audience; listens actively to others. **Decision Making** – uses sound judgment to make good decisions based on information gathered and analyzed; considers all pertinent facts and alternatives before deciding on the most appropriate action. Stands behind investment process, philosophies and ideas but also recognizes when certain investments or actions may not be in the company's or a client's best interest and adapts accordingly. **Initiative** -- recognizes what needs to be done and accomplishes it proactively and with minimal supervision. **Integrity** – shares complete and accurate information; maintains confidentiality and meets own commitments; adheres to organizational policies and procedures. **Planning and Organizing** – plans and organizes tasks and responsibilities to achieve objectives; sets priorities; allocates and uses resources properly. **Quality and Thoroughness** – pays close attention to detail, accuracy and completeness; shows concern for all aspects of the job and follows up on work outputs and with others to ensure that agreements and commitments have been fulfilled. **Reliability** – takes personal responsibility for job performance; completes work in a timely and consistent manner; follows through on commitments. **Stress Tolerance** – displays emotional resilience and the ability to withstand pressure; responds to difficult situations appropriately and while maintaining performance. **Physical Demands / Work Environment** Works indoors in a normal office environment that has environmentally controlled conditions. Consistently operates and accesses information using a computer and other office equipment. Works in a fast-paced environment with unscheduled interruptions. Withstands repetitive wrist/hand movement including regular computer work.

This job description does not list all job duties. Occasionally, a supervisor or manager may request that you perform other duties. Management's evaluation of your performance is based on your performance *of the tasks listed in this job description and these other duties. Management has the right to revise this job description at any time. This job description also is not a contract for employment. Therefore, either you or the employer may terminate the employment relationship at any time, for any reason.*