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425 Phoenix Drive, Chambersburg, PA 17201

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## Wealth Management/Portfolio Manager/PM

truNorth Financial Services, Inc. is a quickly growing, independent, fee-only RIA firm looking to add an experienced PM to our team of financial professionals. Flexible schedule, appropriate pay, and a great culture defines well this company and the role we are looking to fill.

### Qualifications:

- Minimum 5 or more years of wealth management/portfolio management experience
- Progress toward CFA or on the CFA track a real plus but not required
- AFIM, AIF, or similar designations a plus but not required
- Bachelor's degree in Finance or Accounting or equivalent, desired but not required
- No sales goals or pressure (only some occasional work behind the scenes on RFP's)

Required in office hours are 9:30 AM to 4:00 PM Monday through Friday at our Chambersburg office, except for days when the stock market is closed. Flexible working hours, most of the team works 8:30 AM to 5:00 PM Monday through Friday.

Must be dedicated to working with clients on a tailored and customized basis specifically to help them achieve THEIR financial goals, mission, and dreams.

Please do not apply if you think portfolio management is "just a commodity."

Career Track: This position could potentially grow into the Chief Investment Officer / CIO over time.

**Compensation:** \$60,000-\$86,000 annual salary, negotiable depending on years' experience, degree, certification progress, hours to be worked, and other factors.

### Benefits:

- Generous 401(k) and match
- Profit sharing plan
- Bonus plan
- Vacation/sick time
- Flexible working hours
- Great working environment
- Great company culture

To apply, please provide:

1. Cover Letter
2. Resume/CV
3. Three references with at least one professional reference

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