

Position Title: Senior Portfolio Manager
Location: New York, NY (Manhattan 7th Ave & W 34th St.)
Position: Hybrid – In office 3 days/week
Employment Type: Full Time
Hours: Monday-Friday; 9am-6pm



www.wallstreetag.com

Job Summary

Wall Street Alliance Group is seeking a CFA Charterholder to serve as a senior investment authority within the firm. This is a hybrid role that combines:

- Institutional portfolio strategy
- UHNW client-facing engagement
- Cross-disciplinary wealth planning integration
- This role is designed for a sophisticated investment professional who wants to operate in a high-trust, high-complexity advisory environment — not a mass-market platform.

About Us:

Wall Street Alliance Group is a nationally recognized wealth management firm headquartered in Manhattan, New York. The firm operates in a Fiduciary capacity serving high net worth clients. Wall Street Alliance Group has a team of advisors with expertise in areas such as Tax Planning, Estate Planning, Asset Protection, Portfolio Management, 401(k) plans, Defined Benefit plans, Special Needs planning, Physician Financial planning, and Trust services. Please visit www.wallstreetag.com.

Job Responsibilities:

Investment Leadership

- Design and oversee strategic asset allocation frameworks
- Conduct rigorous manager and fund due diligence
- Monitor portfolio risk exposures across market cycles
- Develop capital market assumptions and forward-looking outlooks
- Present portfolio strategy and performance to UHNW clients

UHNW Client Engagement

- Participate in high-level client meetings alongside senior advisors
- Articulate portfolio positioning and macroeconomic insights with clarity
- Address complex liquidity, risk, and concentration issues
- Reinforce the firm's investment discipline and long-term philosophy

Advanced Planning Integration

- Develop working expertise in:
 - Trust planning structures and estate strategy coordination
 - Generational wealth transfer considerations
 - ERISA fiduciary standards
 - 401(k), Defined Benefit, and Cash Balance plan design

- Integration of retirement plans within broader family balance sheets
- You will collaborate closely with senior advisors to ensure seamless alignment between investment management and comprehensive wealth strategy.

Minimum Qualifications

- CFA designation
- 7+ years in institutional asset management, OCIO, private wealth, or multi-family office environment
- Experience presenting to sophisticated high-net-worth investors
- Strong executive presence and professional polish
- Clear, articulate communicator — capable of commanding a room
- Demonstrated intellectual rigor and independent thinking
- High discretion and emotional intelligence
- Preferred:
 - Exposure to estate planning structures
 - Familiarity with ERISA and retirement plan advisory
 - Experience with complex, multi-entity family wealth structures

What This Role Is Not

- Not a junior analyst role
- Not a commission-driven sales position
- Not a siloed back-office function
- This role requires both technical excellence and client-facing confidence.

Additional Details:

- Annual salary of \$150,000 – \$250,000 commensurate with experience
- Hybrid role, Minimum 3 days in the Manhattan office (7th Ave and W 34th St.)
- Benefit Eligible: Group health, vision dental plans, 401k retirement with employer contribution, Paid vacation, sick, and holiday hours
- Opportunities for professional growth and development; including continuing education.
- A supportive and inclusive work environment where your contributions are valued.

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