HEMINGTON
WEALTH MANAGEMENT

JOB DESCRIPTION

Head of Trading

About Hemington Wealth Management

Hemington Wealth Management is a wealth management firm devoted to the mission of positively changing the outcomes of our clients' lives. We work as a unified team and live and breathe our core values: People First, Better Together, Integrity Always, and Commitment to Excellence. This is one of the reasons we are one of the fastest growing Registered Investment Advisors in the country. We are looking for an outstanding new team member to head up our trading responsibilities. If you're a detail-oriented person who loves working with numbers, Excel, and trading software, and you want to join a fun and cohesive team, this could be a great opportunity for you.

This position can be remote, or office based, however you will need to be within 50 miles of our Northern Virginia office as you will be expected to meet with advisors and potentially clients in person from time to time. If you're interested, please contact Ryon Beyer, ryon.beyer@hemingtonwm.com.

An ideal candidate would have:

» A bachelor's degree
» CFA attained or in process
» 5+ years of trading experience

Day-to-Day Responsibilities

Trading

Trading is the primary function of this position, usually requiring 3 hours of dedicated focus daily and more during periods of significant market volatility. Specifically, you would:

» Become proficient in HWM's technology stack: Eclipse, Astro, Orion and Salesforce
» Trade daily to rebalance, manage cash requests/deposits, and loss-harvest
» Develop policies and procedures related to HWM's internal SMA. Work with BD team to develop marketing materials and train advisors on its benefits
» Manage onboarding new clients; implement portfolios
» Interface directly with Orion to stay up to date on their latest developments related to Eclipse, our trading software
» Conduct weekly, monthly, and quarterly portfolio audits (Eclipse vs. Salesforce)
» Meet quarterly with RM/LA to review client portfolios, and address advisors' specific portfolio questions/concerns

In addition to your primary role in trading, other responsibilities include leading the Investment Committee, participating on the Operations team, leading internal and external investment communication and supporting advisors. Specifically, you would:

Investment Committee

» Lead quarterly IC meetings. Manage priorities, agendas and open issues
» Coordinate with DFA and manage their involvement – e.g., attendance at IC meetings, access to investment materials, etc.
» Prepare meeting materials and document action items/outcomes
» Communicate IC action items internally with staff and externally with clients as appropriate
» Lead implementation of IC committee initiatives – e.g., portfolio "sleeves," ESG models, guidelines for unwinding location optimization, etc.
» Lead special projects (e.g., held away accounts audit)

Operations Team

» Be an active participant on the Operations team which meets weekly. Help determine firm priorities in operations
» Learn other aspects of operations for redundancy – e.g., Salesforce imports
» Train back up traders in both Astro and Eclipse

Investment Communication

» Ongoing internal – Prepare weekly talking points for sleeves, attribute performance, and updates on small, value, profitability premiums; disseminate to advisor team
» Ongoing external – Prepare communications for quarterly newsletters and other materials for clients and/or COIs
» Conduct webinars on salient topics (inflation, COVID, Crypto, etc.)

Advisor Training

» Manage advisor training on investment philosophy; coordinate with DFA
» Build/maintain/expand a resource library

Hemington Wealth Management

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