



CHIEF INVESTMENT OFFICER

ROLE DESCRIPTION

Role Title Chief Investment Officer

Reports To Firm Partners

Collaborates With LVZ Investment Committee

Application Deadline Open until filled

ABOUT LVZ

Since our founding in 1960, LVZ remains focused on our mission to **deliver peace of mind for whatever comes next** to clients in every subset of our firm. We started as a small financial planning firm that sold mutual funds - since then, we have expanded to a Federally Registered Investment Advisor. Our firm has grown to \$800 million in assets under management managing portfolios for individuals, advisors, and corporations across the country. Learn more at www.lvzinc.com.

LVZ seeks a dynamic financial professional to navigate the investment strategy for LVZ's portfolio offerings and enhance the function of this role and investment processes. This role acts as the visionary for the LVZ Investment Committee, the LVZ investment strategy, and the key lead communicating portfolios to clients and advisors.

LVZ operates on five core values that define the culture of our team. You are the right culture fit if you...

- Foster a welcoming and respectful environment for team members and clients.
- Create extraordinary client experiences that exceed expectations.
- Operate on a foundation of integrity and clear communication.
- Pioneer new ideas and processes as a result of perpetual learning.
- Give generously of time, talents, and treasure to serve our communities.

ESSENTIAL FUNCTIONS

- Abide by and enhance LVZ's established investment process.
- Produce due diligence on existing investments and identified opportunities.
- Lead the Investment Committee to facilitate our firm's investment process.
- Exercise superb communication to clients and advisors related to investment strategy.
- Collaborate internally with LVZ Investment Management team members across various functions.
- Present economic updates, performance, investment targets, and risk objectives to various audiences.
- Operate with an entrepreneurial mindset to achieve growth metrics for the firm.

Securities offered through Harbour Investments. Investment Advisory Services offered through LVZ, Inc. LVZ, Inc. is a federally registered investment adviser. LVZ Financial Planning and LVZ Investment Management are DBAs of LVZ, Inc.

QUALIFICATIONS

- Professional designation - CFA, CIMA
- In lieu of professional designation - Advanced Degree
- Experience with Orion, or similar platform, is preferred

Hours 40 Hrs.

Salary \$125,000 - \$175,000

Benefits 4 weeks paid vacation, Health Insurance, 401k & Profit Sharing
Short Term Disability, Vision, and Dental available

To Apply Submit your resume and cover letter as application for this role to hello@lvzinc.com
with subject line: '**FULL NAME - CIO Interest**'

PEACE OF MIND FOR WHAT EVER COMES NEXT.