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# Example of Advisory Associate Job Description

Our company is growing rapidly and is looking to fill the role of advisory associate. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don’t fill all of the qualifications, you may still be considered depending on your level of experience.

## Responsibilities for advisory associate

* Acquire and or develop knowledge in credit markets (loans and bonds) and equity markets for the energy sector
* Undertake research analysis into industry sectors as required including power and renewables
* Assist with risk management due diligence process including analysis of current insurance programs, claims and ultimate loss calculations, review of contractual risk transfer, and utilization of risk finance solutions for financial risk mitigation
* Prepare recommendations to clients, and build implementation plans for execution of program to achieve results
* The candidate will participate in meetings with target company management and with client personnel, and the will serve as the primary point of contact for client personnel with respect to day-to-day execution matters
* This position will also involve assistance to IRAS leadership in generation of business leads and opportunities through prospective client presentation development, marketing plan support, contact follow-up, and expanding business contacts
* Processes daily account maintenance to ensure accurate account billing and reporting
* Prepare and send client letters for conversions, closed accounts and rep changes
* May assist with the quarterly performance report mailing
* May log all incoming advisory account paperwork and distribute to IA Firm Review for approval

## Qualifications for advisory associate

* Knowledge in various phases of construction including planning and work breakdown structures, pre-construction services, sourcing and procurement of contracts, contract administration, scheduling, cost estimating, quality management, project reporting, and project closeout
* Field construction experience on different project types and public and/or private clients
* Excellent written and verbal communication, documentation, records retention and work paper organizational skills
* Should have 3-6 years of prior experience at another Financial Institution, preferably with a Corporate focus and preferably sell-side, although will consider buy side as well
* Advanced quantitative education is required
* Solid knowledge in FX and Interest Rate Derivatives