Downloaded from <https://www.velvetjobs.com/job-descriptions/advisory>

# Example of Advisory Job Description

Our innovative and growing company is looking to fill the role of advisory. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for advisory

* Effectively runs all deal aspects with limited Managing Director guidance
* Manages multiple chargeable and non-chargeable projects of varying size and complexity - Possesses ability to identify potential transaction risks and implements strategies to address the risks
* Proficient in purchase accounting and SEC Reporting guidelines
* Abides by risk management guidelines and engagement review memo procedures
* Assist with Assurance / Insurance activities, quotes
* Consult directly with the Senior Advisory specialist who will liaise with the related Private Banker/Wealth Manger
* Consult with the Senior Advisory Specialist who liaise with clients under the supervision of the regional Advisory Specialist, the related Private Bank/Wealth Manager
* Provide support in the drafting of Wills and Trusts
* Responsible for major commissions / projects that are complex & challenging
* Proactively communicate progress on an on-going basis, ensuring transparency throughout

## Qualifications for advisory

* Typically qualified accountant with ACA, CIMA or other accounting qualification, and a strong academic record
* Ideally 1-2 years post-qualification experience (PQE) for Senior Consultant roles, 3-4 years PQE for Manager roles, and 5 years plus PQE for Senior Manager roles
* At least 10 years of experience as a WMA
* Bachelor's degree required, preferred field Finance, Economics or Business
* At least 4 years experience in WebSphere Commerce services engagement
* Database design and methodology