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# Example of Associate Investment Job Description

Our company is growing rapidly and is looking to fill the role of associate investment. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for associate investment

* Open and update client files
* Closely monitor day-to-day transactions
* Generate portfolio management reports using the Croesus system
* Manage advisors' agendas, schedule appointments and prepare for client meetings
* Provide clients with tax slip information
* Help clients use digital banking services
* Implement efficient procedures for the administration of client files
* Supporting Investment Team managing portfolio
* Maintain trading platforms with accurate info and coordinate data with custodians
* Evaluate and offer improvements in risk management and analytics of the investment portfolio

## Qualifications for associate investment

* Ability to use initiative on a daily basis
* Strong communication, interpersonal skills and attention to detail are essential
* Proficiency in Microsoft Office (Word and PowerPoint) is essential
* Flexible, adaptable and must be able to work under pressure
* Candidates should have 2-3 years of investment and personal trust client servicing experience
* Minimum of 5 years of experience either working in investment banking, private equity, principle investment, or capital firm