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# Example of Associate Portfolio Manager Job Description

Our company is growing rapidly and is looking for an associate portfolio manager. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for associate portfolio manager

* Research index events and evaluate trading opportunities
* Explaining product offerings to clients, including objectives, expected performance, risks and structure
* Coordinates the execution of all block trades (i.e., allocates partial trades, researches and resolves trade issues, completes trade tickets, and keeps records of trade activity)
* Coordinates trading and oversees administration of all custody and non-custody accounts
* Analyzes and prepares reports of cash flow analysis to ensure adherence to trust agreements
* Proactively identify, investigate and resolve client inquiries and provide the Investment Counsellors with recommendations for resolution of complex situations
* Proactively participate in regional/national projects that seek to continuously improve upon client solutions operation efficiencies
* Ensure client portfolios are structured and managed within parameters outlined in the Investment Policy Statement
* Manage and execute repo financing for multiple asset classes across GSAM’s Global Fixed Income hedge fund, mutual fund, and insurance complex
* Advise portfolio management sector teams on optimal funding structures to achieve portfolio objectives and maintain desired investment strategies

## Qualifications for associate portfolio manager

* A minimum of two years’ experience in the separately managed account business and 3-5 years in the financial services industry is expected
* With ever increasing competitive pressure, and the need to drive income growth consistently, there is a need to show resolute strength in transacting high quality business
* Solid practical understanding of real estate investment concepts – appreciation of broader investment (stocks, bonds ) concepts a plus
* The successful candidate will be a self-starter, highly motivated, and goal oriented
* The candidate should possess extensive analytical skills, evidence of ability to master portfolio management skills, and will have a proven aptitude for effective client engagement
* The candidate should possess experience in fixed income investments and have a proven track record of responsibility and attention to detail