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# Example of Client Portfolio Manager Job Description

Our company is growing rapidly and is hiring for a client portfolio manager. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for client portfolio manager

* Represent Pioneer’s fixed income investment strategies and capabilities internally to sales, consultant relations, relationship management and marketing teams
* Develop and execute marketing strategies to drive new business, including the thoughtful development of presentation materials, topical sales ideas and research papers
* Interpret portfolio attribution and equity market trends to drive content and messaging used in client materials
* Drive new business and maintain existing relationships through active participation in sales meetings, finals presentations and portfolio reviews
* Utilize knowledge of industry
* Active sales of MACS products jointly with PB front
* Client update meetings and pitches
* Monitor wins/losses and deals in the pipeline
* Prepare bespoke reporting
* Support Client Advisors and Portfolio Managers with customised material for events, client pitches, client reviews and internal meetings

## Qualifications for client portfolio manager

* Prospecting (in consultation with sales teams) focusing on custom mandates
* Conveying information pertaining to the product and related markets to both internal and external clients
* Client management and service focusing on sophisticated clients with high-touch non-standard service model and investment content (Sovereign Wealth, etc)
* Seen as credible alternative to senior GST members and CIO/PM team
* The preferred person must have the ability to help client articulate and define their objectives
* Demonstrate & engage in meaningful discussion/debate and be part of "design team" when building out institutional custom solutions mandates