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

# Example of Financial Institutions Job Description

Our innovative and growing company is looking to fill the role of financial institutions. 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 financial institutions

* Partner closely with regional and global iShares teams to understand the global iShares product suite, customer uses and benefits, to import global “best practices” to the Japanese market
* Deliver sales presentations and meetings with clients / prospects, to educate clients on the benefits of iShares and ETF usage
* Maintain the relationship with the existing very large and important account together with the manager, including fixed income products day to day liaison between investment boutique and the client
* Sales responsibilities to cultivating other clients in financial institution segment
* Developing as area expert in specialized function or business /product
* Responsible for the day-to-day technical or functional expert in assigned area
* Origination of new business initiatives and opportunities leading to revenue, profit margin and overall growth of relationship with assigned portfolio of clients
* Developing expertise in our client’s industry dynamics and trend their specific positioning
* Help develop new business opportunities by preparing and presenting value-added client presentations based on relevant industry research and detailed financial analysis and modeling
* Design, build and manage discounted cash flow, comparable company and other valuation methodologies to support advisory and capital raising pitches and transactions

## Qualifications for financial institutions

* Support and follow up the marketing event organized locally and globally
* Experience of more than 3 years of institutional sales including financial institution
* Promotion experience of several asset classes including equity, fixed incomes and alternatives etc
* Securities broker representative license（Mandatory）
* Better to have fixed income and structured product experience
* 7+ years of experience focused on broker-dealers