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# Example of Financial Services Advisory Job Description

Our company is hiring for a financial services advisory. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for financial services advisory

* Support the FAS and TRS practices through engagement analysis, pricing models, and revenue recognition topics working closely with accounting
* Prepare and distribute monthly reports and other documents, data and financial analysis to FAS and TRS Managing Directors and practice leaders as assigned
* Support preparation of internal finance presentations and related analyses/commentaries
* Handle sensitive and emergent emails and calls from leadership, Managing Directors, staff and other contacts for follow-up
* Handle other ad hoc financial and accounting analyses
* Make well-prepared outbound calls and limited strategic emails to pre-qualified and highly targeted lists of high-level individuals in the Technology + Intellectual Property industry (not broad telemarketing)
* Create and maintain a list of qualified prospects and manage information in the CRM
* Pre-qualify and rate leads based on level of interest and research
* Set up and follow up on appointments with qualified leads in a highly professional manner
* Research and identify new business development opportunities and targets

## Qualifications for financial services advisory

* MBA/ CPA / CFA or other professional qualifications will be useful
* 3–4 years of previous experience in the areas of Audit or Corporate Finance
* Bachelor degree or above with major in quantitative finance, actuarial science, financial engineering is an advantage
* Professional certification of CICPA, HKICPA, CFA, FRMor relevant qualification is preferred but not essential
* For Associate Director - above 8 years' relevant work experience, of which experiences in Big 4 accounting firm and/or bank treasury/ mid-office are preferred
* For Manager - above 5 years' relevant work experience, of which experiences in Big 4 accounting firm and/or bank treasury/ mid-office are preferred