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# Example of Investment Advisory Job Description

Our company is growing rapidly and is hiring for an investment advisory. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for investment advisory

* Works directly with branch-office teams to educate and provide solutions on questions regarding financial goals through our various advisory programs
* Complete hypos, illustrations and comparisons for brokerage and advisory programs
* Using extensive breadth and depth of knowledge, systems and tools that span across 4-5 topical areas and/or divisions, provide branch teams with solutions that specifically meet client objectives
* Provide information and guidance to branch teams on multiple advisory program choices, their features and benefits, different investment products, and various systems/tools
* Joining Senior Portfolio Managers to interview hedge fund, alternative, and traditional asset managers to perform qualitative and quantitative due diligence
* Write research reports and provide opinions on managers
* Negotiating investment manager agreements, including fees and terms
* Ongoing monitoring of existing client mandates
* Collecting returns and exposure data for performance attribution and risk analysis
* Informing colleagues and clients of developments in alternative asset classes

## Qualifications for investment advisory

* Innovative self-starter who works well under time pressures
* Ability to function independently in an unstructured environment
* Team player who works collaboratively with others
* Experience with Morningstar Direct and Bloomberg would be an asset
* A degree from a four-year college or university with relevant coursework in finance or accounting
* Prefer someone with one to two years of Analyst-level Investment Banking or Capital Markets experience