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# Example of Investment Operations Job Description

Our company is growing rapidly and is hiring for an investment operations. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

## Responsibilities for investment operations

* Support the creation of monthly and quarterly client reports in a timely and accurate fashion
* Assisting Trader Support Analyst in fielding operational issues raised by the desk
* Developing an understanding of the Fixed Income business and the systems used to support the business
* Monitor and evaluate relevant market news by keeping abreast of significant events that may impact the valuation of the firm’s mutual fund projects and assist in coordinating the team’s efforts with the Manager
* Review team tasks as needed on local holidays, weekends, and during Business Continuity exercises/relocations
* Plan and set departmental goals
* Business Continuity – provide direction and make decisions during unexpected events
* Assisting with the production of client meeting materials, client questionnaires, and RFI/RFP responses
* Independently owning the end to end resolution of complex intra-day inquiries from the company's clients and investment teams
* Working with global reporting leadership to ensure baseline processes and controls are standardized across all investment product silos

## Qualifications for investment operations

* Not often but required to travel periodically
* Identify account specific issues and troubleshoot
* The ability to interact and partner with various internal and external stakeholders
* 1 to 2 years Call Center/Customer Service experience preferred
* Opportunity to work overtime as needed to support business objectives
* A current FINRA Series 7 and 63/66 license required