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# Example of Investment Sales Job Description

Our company is looking for an investment sales. 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 sales

* Proactively identifying new business opportunities by completing ongoing screens to assess our competitive positioning/advantages and staying abreast of current manager searches
* Developing and completing presentations for client and prospect meetings
* Participating in and working with relationship managers to prep for client meetings – both for new business opportunities and ongoing due diligence with clients
* Conducting research and bringing proactive ideas to the forefront for client and prospect firms
* Coordinating information with Client Portfolio Managers for meeting preparation, client agendas, discussing client issues and gathering follow-up information
* Building relationships with and leveraging shared resources across Funds Management and the Portfolio Management teams to communicate and relay sales and market intelligence
* Providing relationship managers and clients with analysis of the competitive landscape through use of analytical tools
* Develop and drive robust sales and distribution strategy for the region in partnership with the BLK Impact team and distribution partners across retail and institutional channels
* Provide input to business strategy/planning, working collaboratively with colleagues to enhance the client experience by communicating plans, on-going client issues, and client engagement strategies
* Gather information from clients and consultants and provide input to drive scalable product development strategy

## Qualifications for investment sales

* Minimum 50 words of Chinese and English typing
* Qualified with Trust Sales and Senior Securities Brokerage license
* 5-10 years experience in the financial industry with 3-5 years direct outside intermediary sales experience with an ETF, mutual fund, separate account, or hedge fund distributo
* Credit Derivatives Sales to cover major Japanese Financial Institutions
* Minimum 3 year Credit Derivatives Sales or Structuring experience with Investment Bank based in Japan
* Credit Sales experience in Global Investment Bank based in Japan