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# Example of Investment Specialist Job Description

Our growing company is looking for an investment specialist. 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 investment specialist

* Identifies opportunities for expanding relationships through additional products or services
* Individuals in this position search for, compile, prepare, and input data for further analysis for the Asset Management Services team
* Schedule and coordinate meetings including, booking meeting rooms, contacting catering, arranging conference call details , as necessary
* Liaison between Investment Specialist (IS) Head Office, mobile sales force, RDs and internal
* Work with Third Party representatives to provide accurate accounting of client accounts between third party system and trust system
* Work with internal client manager to ensure proper paper work has been submitted to third party provider and report on reconcilement results
* Work with Portfolio Manager to ensure trading models are accurate between third party system and trust system
* Validate and post activity to the Global Plus trust accounting system from third party system
* Assist with production of marketing materials
* Build solid internal relationships and partnerships with global staff

## Qualifications for investment specialist

* Knowledge and understanding of performance reporting with regards to Time Weighted Return, Dollar Weighted Return and how transaction data will impact reporting of these performance methods
* Minimum of two years proven experience as an Internal Wholesaler, Securities Sales Assistant, Financial Advisor or other securities industry sales or equivalent
* Series 7 and 66 or Series 7, 63 and 65 licenses
* Familiarity with General Mutual Fund and Mutual Fund Wrap Program Sales, brokerage account opening and account maintenance procedures
* Handle large volumes of work
* Generate deliverables on both a pre-planned schedule and ad-hoc basis