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# Example of Investment Strategist Job Description

Our innovative and growing company is looking for an investment strategist. 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 strategist

* Forms a partnership and strong working relationship with the firm’s investment team the advisors within CWM
* Working knowledge of research tools such as FactSet and Bloomberg is preferred
* Self motivated and works well creating individualistic research
* An avid reader of financial periodicals such as WSJ, FT, to complement internal research
* Proficient in Mandrin preferred
* Developing global macro, cross-asset investment views, creating original investment themes, and developing implementation and trade ideas
* Working with Private Bank, Investment Bank, and institutional partners in developing investment solutions
* Creating sales literature and presentations highlighting trading and investment ideas for both external clients and internal investment committees
* Presenting and communicating investment recommendations and trade updates to global salesforce
* Maintaining databases used to manage and track investment ideas and updating presentations and client materials as needed

## Qualifications for investment strategist

* Graduate in Commerce/Finance/Economics
* Specific knowledge of MLTC systems (CRC, PIECRE, ), basic Microsoft Office applications, will be required
* MA/MS/MBA required
* Strong background in investment research or portfolio management, ideally with substantial quantitative experience
* PhD or Masters degree in Economics
* Bachelor's degree in finance or economics is required MBA in finance and/or CFA is preferred