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# Example of Investment Strategist Job Description

Our company is searching for experienced candidates for the position of investment strategist. 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 strategist

* Responsible for developing wealth management regional investment views across and within asset classes, contributing to the development of discretionary and advisory strategies for UHNW clients in Asia Pacific
* Engaging with the investment offices of existing and prospective clients to understand the nature of the client’s investment problem and their outcome objectives
* Advising on topics including risk management, risk budgeting, asset allocation, portfolio construction, and liability-driven investing
* Deliver client presentations based on new ideas in portfolio construction and risk management
* Compose articles and white papers on relevant topics of interest
* Maintaining and developing knowledge of the broader themes, trends, and competitive landscape within the US institutional client universe
* Responds to questions, consulting bank partners for additional product/service information when necessary
* Consults with clients and their attorneys on the benefits of estate planning products/services
* Maintains current in-depth knowledge of a full range of trust-oriented services
* Maintains periodic contact with client and acts as a liaison between the client and the rest of the bank for various activities

## Qualifications for investment strategist

* European languages such as German and Dutch would be advantageous
* Progress in or achievement of FIA or CFA qualifications
* Proficiency in European languages such as German and Dutch advantageous
* Bachelor’s degree required, CFA/MBA designation or progress towards preferred
* Passion for capital markets
* Experience using Excel, Bloomberg, Factset, PowerPoint and ability to learn other investment software/analytics