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# Example of Managed Accounts Job Description

Our growing company is looking to fill the role of managed accounts. 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 managed accounts

* Update, maintain and improve existing analytical tools, models and processes used to select investment managers and evaluate client portfolios
* Responsible for oversight of discretionary program reviews and self-monitoring, including the development and maintenance of the investment advisory policies and procedures and all related desk procedures
* Perform regular reviews of composite data on advisor and client facing tools
* Contribute to the delivery of new products and services through funded enhancements that increase ease of use, competitiveness in the marketplace and/or improve profitability
* Commitment to partner with Business Development Executive(s) to maximize territory sales coverage and increase assets
* Promoting positive team morale, and a high integrity environment
* Provide various reporting through the use of internal/external data
* Maintain strong working relationships with product partners and other company stakeholders
* Partner with subject matter experts across the firm and outside of the firm to continually improve the quality of advice being given to clients
* Provide support and participate in advisor/client presentations and field facing events

## Qualifications for managed accounts

* Hard working, Quick Learner & eager to learn new technologies & understand business
* Ability to work as part of small team or individually with changing requirements and adapt to changes in business and technology landscape
* Minimum 3-5 year operations experience including trading, ideally in a wrap account trading environment
* Strong analytical and problem-solving skills using data to identify trends
* NASD Series 66 or combination of Series 63/65 (to be completed within 180 days of hire)
* 3 years of experience in sales or 3 years of experience in operations or 3 years of experience in client service roles