Downloaded from <https://www.velvetjobs.com/job-descriptions/managed-accounts>

# Example of Managed Accounts Job Description

Our growing company is searching for experienced candidates for the position of managed accounts. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for managed accounts

* Translate investment knowledge into client results
* Actively manage relationships with external partners and advisors
* Contribute to strategic projects related to business goals
* Perform customers visits per team goals to support sales, evaluate sales model performance and strengthen customer perspective
* Direct management of field specialty sales specialists
* US Sales and Service Management
* Global Software Development
* Manage a direct portfolio of clients made up of EU and US head quartered accounts
* Oversee client communications that impact the book of business and ensure communication protocol is adhered to
* Direct the relationship for the managed accounts through a combination of face-to-face, phone and written communication channels

## Qualifications for managed accounts

* Must demonstrate strong understanding of managed account products and brokerage operations
* Strong understanding of third party products and brokerage operations
* Solid presentation skills for use in one-on-one in frequent large group settings
* Experience with Vestmark, Fiserv APL, and SMA sponsor systems a plus
* Experience with investment performance and/or end client reporting preferred
* Experience with analytical software used to evaluate investments (Excel, Access, FactSet, Morningstar Direct, Bloomberg)