



Example of Advisory Manager Job Description

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Our company is growing rapidly and is looking for an advisory manager. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for advisory manager

- Is an acknowledged SME on all things related to project management
- Coordinate workflow among Investment, Relationship Management, Risk Management, Operational Due Diligence, Legal and Operations teams to ensure timely and accurate (i) completion and delivery of all required documents
- Coordinate with relevant teams to manage database of accurate reference information including the classification of investment strategies, accounts, managers, funds, clients, notification requirements, funding deadlines, and client-specific manager approval requirements
- Maintain a timeline of active transactions that identifies all steps in the investment process and the time needed to effect each step in the process, and provide timely tracking and notification to the appropriate parties
- Ensure that proposed investments have been reviewed and approved by the appropriate parties, both internal and external
- Liaise with appropriate teams to disseminate information in a timely manner, resolve critical activities, and provide ongoing support
- Play a critical role in the evolution of firm-wide workflows and systems infrastructure
- Identify and escalate time-sensitive issues requiring coordination and resolution
- Oversight of tax aspects of all legal documentation
- Up to 5 years PQE, coupled with strong Tax Advisory experience from within a similar role from a financial services, commodities/private equity or similar

Qualifications for advisory manager

- Have previous experience of in leading the delivery of projects/assignments
- Have prepared business plans, financing and restructuring proposals
- Bachelor's degree (or higher) in finance, accounting or related field (willing to accept foreign education equivalent)
- Five years of financial accounting, auditing, and reporting experience
- You will join our motivated, multicultural team at our office in Geneva
- Have at least 2 year work experience in Switzerland