



Example of Asset & Wealth Management Job Description

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Our company is growing rapidly and is searching for experienced candidates for the position of asset & wealth management. To join our growing team, please review the list of responsibilities and qualifications.

Responsibilities for asset & wealth management

- Conduct database and internet research to support information requests submitted by internal clients and members of Oliver Wyman's global knowledge organization
- Utilize access to a wide array of information resources including industry focused online databases so that you can identify and organize macroeconomic indicators, company financial data and industry trends
- Maintain your own topical information products to help consulting teams stay current in their knowledge of changes and trends in key industry areas
- Provide periodic updates for our global asset management proprietary models
- Analyze data to glean deeper insights on the wealth and asset management segment to enhance your deliverables and service to your clients
- Actively involved with consolidating, analyzing, and synthesizing large amount of complex financial and non-financial information from numerous suppliers from WAM BU Finance and Reporting teams
- Preparing high-quality monthly and quarterly reports, dashboards and presentations that are presented to the WAM BU heads (G9) and Global Wealth Council (GWC), in a timely and organized fashion
- Demonstrating strong attention to detail, focusing on financial integrity, consolidation, alignment, and consistency in "look and feel" deliverables
- Initiating ongoing improvements by exploring, identifying, and implementing reporting, analysis, and process solutions

Qualifications for asset & wealth management

- Strategic thinker and ability to develop and execute both short and long term solutions
- Demonstrated ability to be an integral team member on large-scale, complex global projects (planning, designing, documenting, and communicating)
- Work with technology team to identify software development expenses eligible to be capitalized
- Perform Soft Cap validation, monitor WIP aging and prepare GL adjustments
- Assist with the impairment reviews of Software Capital WIP and Assets
- Prepare detailed trackers to be utilized for the reconciliation and substantiation of general ledger accounts