



# Example of Associate Investment Job Description

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Our company is growing rapidly and is looking to fill the role of associate investment. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for associate investment

- Open and update client files
- Closely monitor day-to-day transactions
- Generate portfolio management reports using the Croesus system
- Manage advisors' agendas, schedule appointments and prepare for client meetings
- Provide clients with tax slip information
- Help clients use digital banking services
- Implement efficient procedures for the administration of client files
- Supporting Investment Team managing portfolio
- Maintain trading platforms with accurate info and coordinate data with custodians
- Evaluate and offer improvements in risk management and analytics of the investment portfolio

## Qualifications for associate investment

- Ability to use initiative on a daily basis
- Strong communication, interpersonal skills and attention to detail are essential
- Proficiency in Microsoft Office (Word and PowerPoint) is essential
- Flexible, adaptable and must be able to work under pressure
- Candidates should have 2-3 years of investment and personal trust client servicing experience

