



Example of Associate Investment Job Description

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Our innovative and growing company is looking for an associate investment. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don't fill all of the qualifications, you may still be considered depending on your level of experience.

Responsibilities for associate investment

- Coordinates production of monitoring reports and other client advice including communication of client specific requirements to analysts with minimal guidance from supervisor
- Prepares cost estimates for work projects and assists in managing work to ensure completion in line with budgets
- Handles special projects or assignments as needed
- Takes personal responsibility for the timeliness and quality of the work performed and for completing the work within budget
- Work side by side with the Senior Financial Advisor
- Research and resolve complex and sensitive questions and problems
- Gather appropriate data needed for the account to be accurately reviewed
- Update and prepare presentation material for client meetings
- Monitor cash levels for investment accounts and makes recommendations to investment manager
- Complete trades in client portfolios as recommended by Investment Strategists

Qualifications for associate investment

- Advanced/Intermediate knowledge of MS Excel
- Experience and/or knowledge of financial accounting
- Bachelor's in Finance, Accounting, or related area AND 2 years of related

- Minimum of 1 year experience in investment management, investment research or analytical responsibilities within the financial markets industry with client servicing experience preferred
- Bachelor's degree with high academic credentials