



Example of Financial Services Consultant Job Description

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Our growing company is looking to fill the role of financial services consultant. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

Responsibilities for financial services consultant

- Work collaboratively with customers to interpret, assess, and explain student accounts
- Work with other internal and external contacts to resolve student account related issues
- Review cashiering and transfer related request for accuracy, completeness and suitability
- Communicate NIGO information to financial advisors and be able to follow up and obtain additional paperwork and/or information necessary
- Have the ability to cross train as other business needs arise train others
- Lead development of strategic presentations on Financial Operations to GCM Senior Managers
- Lead Strategic Road-mapping and Project Management for 2-3 key cross-functional strategic initiatives a year – including current state assessment, future state brainstorming, roadmap prioritization and buy vs
- Manage a portfolio of 17 critical vendors through performance assessments, incident oversight, and contract optimization
- Establish and foster strong working relationship with peers, within Finance Operations and GCM Finance, with other functions within GCM and other SBUs
- Lead and Coordinate several highly complex, high impact root cause problem solving projects and ad hoc analysis to drive significant continuous

Qualifications for financial services consultant

- Native Czech/Slovak and fluent English
- Interest in the new disruptive forces in Financial Services
- Bachelor or Master degree in either Economics, Finance, Business Administration or Information Technology
- 3 to 5 years' work experience in Banking Operations environment is mandatory
- Broad Financial Products (Equities, Fixed income, Payments, FX, Money Market, OTC derivatives...) knowledge
- Understanding of front to back processes including latest industry regulatory environment and systems landscape