



Example of Global Investment Management Job Description

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Our growing company is looking to fill the role of global investment management. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for global investment management

- Estimation – giving effort estimates when planning a project so that project schedules and costs are fairly accurate and as expected
- Execute the investor tax reporting oversight (G/A/U/S/B/PFIC)
- Oversight of UK tax reporting (eg ISA reporting, Type 18)
- Execute and coordinate dividend distributions
- Execute Fund portfolio tax oversight including potential for reclaims outside normal custodian service
- Execute the FATCA / CRS reporting (including UK)
- Execution and oversight of other US tax reporting requirements (eg 1099 reporting)
- Reporting to ManCo CPs and wider Corporate Tax organisation
- Perform tax related administration work (custody documentation, 302 mergers, 1120-F, W-8BEN, GIIN and others)
- Reporting to ManCo Conducting Persons and wider Corporate Tax organisation

Qualifications for global investment management

- SQL, VBA preferred (not required)
- SAS ABM experience a plus
- Ability to work under rigid deadlines and manage multiple tasks
- Degree in Management Information Systems preferred

- Strong understanding of the relevant concepts, applications and implications associated with tax regulations