Example of Global Investment Management Job Description

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Our growing company is looking to fill the role of global investment management. To join our growing team, please review the list of responsibilities and qualifications.

Responsibilities for global investment management

- Relationship with service providers (incl
- Execute the FATCA / CRS reporting (including UK funds)
- Oversee FATCA / CRS related processes within the Client Onboarding team in Luxembourg and the United Kingdom
- Execute, as a backup to the team, the investor tax reporting oversight (G/A/U/S/B/PFIC) or dividend distribution process
- You will be responsible for preparing, sending and tracking investment policy statements
- You will also be involved in asset mix analysis, and rebalancing the portfolio (with Manager’s approval) where required
- Your presence will also be required at meetings where you will be compiling notes, and following up on outstanding issues with the Investment Advisors
- Your organizational skills will come into play as you assist the Investment Advisors in preparation for Client Meetings
- You will be running reports and assisting to decipher any discrepancies that appear on Investor Statements
- In your key role as Administrative Support, you will also create estate packages, compile manager review schedules and book appointments, and assist with mail outs as required

Qualifications for global investment management

- 2+ years work experience in financial services industry with Private Wealth Management experience a plus
- Specific investments knowledge with an understanding of single stock and single bond sensitivity to market changes
- Have held the series 7 & 63 licenses (this is not a licensed role but the knowledge is comparable)
- 1-3 years of experience in Investment Management and Operations
- Familiarity with relational databases and administration of systems