



# Example of Investment Product Specialist Job Description

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Our innovative and growing company is looking for an investment product specialist. 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 investment product specialist

- Organizing State Street invoice validation and signoff
- Responsible for adhoc Treasury report requests
- Promote an operational mentality towards continuous process enhancements
- Develop a deep understanding of our client's business, investment objectives, investment guidelines and portfolio composition
- Become fully conversant in MIM's investment capabilities, market views and portfolio strategies
- Communicate/liaise with clients by telephone or in person, as needed
- Manage quarterly client reporting packages
- Conduct market and portfolio analyses as needed
- Build and strengthen client relationships through ongoing contact, professionalism and high level of responsiveness and proactive effort
- Directly influence and execute strategy for the product set managed by the Sr

## Qualifications for investment product specialist

- Communicative and strong ability to negotiate deals with counterparties
- Knowledge of Microsoft Access would be a plus
- Proficient with Excel is a must
- Using strong interpersonal skills to building strong working relationships with

- Experience with Canadian retail and institutional distribution landscape product solutions
- Experience in bond portfolio construction and management --- recommend switches, hedges