



Example of Investment Product Specialist Job Description

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Our company is growing rapidly and is hiring 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

- Create/maintain training materials, marketing materials and investment resources as it pertains to investment products
- Possess a firm understanding of the diagnostic sales process and employ its principles and techniques when engaging with a prospect or client
- Support existing Investment Management content and feed clients with a strong focus on renewal rate
- Assist the trial process with a thorough understanding of the client's workflow, and how Market Intelligence's content and feed solutions (including ClariFI and various enterprise delivery platforms) may enhance that workflow
- Help with SQL queries for Xpressfeed and/or ClariFI clients, and utilize other scripting languages (Python, R, Matlab, etc) to assist clients with data-related projects both pre and post-sale
- Act as a product specialist for the content and feed business by understanding the application of Market Intelligence content for complex buy side workflows, conducting training, troubleshooting problems, answering product questions, and working on proof-of-concept projects to ensure that the client has the tools that will make their content and feed experience a success
- Assisting to manage the control, amendments and issue of all the Terms and Conditions
- Providing Subject Matter expertise around all of our products and support to

- Supporting the maintenance of all product related documentation including but not limited to agreements, terms and conditions, account application/maintenance forms and standard letters
- Managing the creation and issue of bespoke communications to customers

Qualifications for investment product specialist

- Proven track record in UCITS development and management
- Up to date knowledge on UCITS regulations and developments in the Irish domicile offerings
- 3-5 years+ of experience working at an investment management firm in a client-facing role
- Knowledge of general economic conditions and their impact upon global corporate credit fundamental and technical market conditions
- Superior interpersonal and oral and written communication/presentation skills
- Self-motivated and well-organized, with the capability to work within a team