



Example of Investment Product Specialist Job Description

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Our company is searching for experienced candidates for the position of investment product specialist. 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 investment product specialist

- Liaising with colleagues including C-level stakeholders in resolving complex complaints
- Acting as the customer advocate to input to projects which impact the end customer
- Providing project support where required, ensuring own deliverables are on time and to specification
- Assist the trial process with a thorough understanding of the client's workflow, and how Market Intelligence's content
- Possess a strong understanding of the diagnostic sales process and employ its principles and techniques when engaging with a prospect or client
- Close interaction with other investment professionals responsible for Mutual Funds, Liquid Alternatives, Private Equity, Structured Asset Solutions, and Asset Management developing the investment solution positioning and communication elements for the advisory business
- Being part of the investment value chain with proximity to the Investment Committee, the Advisory Implementation Committee and Investment Strategy & Research providing the house view and the investment themes
- You join a visionary, very dynamic and highly motivated team, whose team spirit and specific expertise guarantee an exciting working environment and growth opportunities
- Partner with Division & Regional Directors, Divisional Investment Manager,

- Coordinate the assimilation, development, packaging and dissemination of the RFP response

Qualifications for investment product specialist

- Extensive experience in a product development/management capacity in a financial environment
- 4-10 years of relevant industry experience (banking, investment management, consultancy) and ability to transplant this knowledge into product conversations
- Deep understanding of bank financials and the banking sector environment
- Demonstrates drive, initiative, energy and sense of urgency
- Passion for data driven analytic solutions
- A high level of client service and communication skills