



# Example of Investment Product Specialist Job Description

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

## Responsibilities for investment product specialist

- Take direct responsibilities for allocated strategies and understand their points of differentiation and portfolio status
- Produce regular insightful updates (written and filmed) and in-depth thought pieces from managers of the allotted strategies
- Candidate has excellent communication, client relationship management, and marketing/design skills
- Help to develop and prepare management level presentations in support of product implementation
- Work closely with Sales Management teams to evaluate client and advisor feedback
- Serve as a subject matter expert to internal partners and external money managers
- Develop strategic and tactical (ad hoc) reports and trackers
- Implements the local ADV strategy and roadmap
- Keep himself/herself informed and aware of the SGPB/KH investment strategy, key themes, and also of any potential evolution/change within the SGPB/KH investment offering
- The role is very diverse, balancing day to day queries with regular client commitments

## Qualifications for investment product specialist

- Bachelor's degree in Business Marketing, Economics or a related field
- Minimum 2-3 years work-related experience in product and/or project role or equivalent
- Ability to solve complex problems, focusing on results, often times managing many complex asks at a time
- Working knowledge of the financial services industry with an emphasis on the Registered Investment Advisor market
- Functional knowledge of Microsoft Office applications including Excel, Outlook, Word, and PowerPoint