Example of Portfolio Strategist Job Description

Our company is growing rapidly and is looking to fill the role of portfolio strategist. 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 portfolio strategist

- Conduct research and develop written content and marketing materials in support of prospect development and client relationships management in the US
- Oversee regular collateral production for client mandates
- Undertake comprehensive due diligence on each potential client opportunity, in collaboration with R&D teams
- Provide extensive thought leadership in the development and implementation of the wealth management investment strategy for affluent clients and prospects
- Proactively identify portfolio management opportunities that address affluent clients' portfolio management needs, factoring in current market conditions
- Factoring in affluent clients/prospect overall financial planning goals, assist the advisor in developing and presenting investment ideas and portfolio recommendations
- The Product Strategists and Portfolio Designers manage the GM relationship for the line of business they support and set best in class standards for product strategy based on insights and analytics
- Work through ambiguity to independently design and manage multiple end-to-end, enterprise-level processes that remove customer-facing content and customer service agent-facing procedures across a variety of systems
- Conduct stakeholder interview sessions with cross-functional system and business owners to identify and compile the set of existing policies and

- Navigate core technical systems to outline and prioritize features, functionality and/or procedures to be implemented

Qualifications for portfolio strategist

- Strong foundation in financial theory, current market knowledge
- An inquisitive nature, strong communication and negotiation skill are required to effectively obtain business requirements and approvals from various stakeholders
- Significant investment management and cross asset class knowledge with product and sales/client servicing and support experience
- Min Bachelor's degree or equivalent with relevant post graduate experience in an investment management or related firm
- Experience from a product specialist, relationship management or sales support background
- Collaborative and cooperative approach to tasks with disciplined organization and project management skills