



Example of Specialist Advisor Job Description

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Our company is growing rapidly and is looking for a specialist advisor. 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 specialist advisor

- Work with the portfolio managers and research analysts to develop and implement investment strategies that are able to be communicated to investment professionals within the intermediary channel
- Perform portfolio analytics on characteristics, performance and benchmarks, and develop client and prospect presentation material necessary to effectively communicate our philosophy, process, and performance
- Support senior regional and regional directors as needed with cross-selling and servicing
- Work within a consultative nature with the national accounts team to develop engagement strategy with analyst for each platform
- Manage the client/prospect investment due diligence meeting needs from the point of intake to final close-out of the last follow-up item, including conducting due diligence calls, on-site meetings and select offsite meetings
- Establish and maintain key touchpoints including but not limited to home office investment gatekeepers, research analysts, product managers, marketing, compliance, legal and operational contacts
- Represent William Blair at industry conferences and events
- Effectively conducts group presentations on FAS-approved content at advisory firms' conferences, regional meetings, and educational events
- Works with internal partners to enhance current presentations and develop new content
- Reports event feedback to client contact and FAS Key Accounts sales team to

Qualifications for specialist advisor

- Broad Storage and/or Data Protection Competencies
- Excellent written, oral and listening capability
- Experience with backup products such as EMC Networker, Avamar, DataDomain, Veritas Netbackup, IBM TSM, Tape libraries, VTL and
- Currently reside in Singapore
- Product management experience, strategic marketing or product development
- Exceptional written and verbal communication skills with ability to build rapport with all levels of the organization internal and external stakeholders