

Job Profile for Financial Advisor/Non Discretionary Portfolio Analyst

Responsible for managing existing non-discretionary client relationships, by utilizing excellent client experience to guide existing clients towards their financial goals. He/She is also tasked with adding to Asset Under Management (AUM), through referrals and other business opportunities, and formulating & implementing/executing financial advice.

Role Qualification:

Academic/Professional: BSc/Degree from a reputable Tertiary Institution. Relevant postgraduate (MSc, MBA) and/or professional qualification (CFA etc) would be an added advantage.

Work Experience: Minimum of 2 years professional experience in related position.

Key Responsibilities:

- Provide objective and holistic financial planning advice to clients
- Deliver the firm's private client proposition, while adhering to the firm's compliance procedures
- Seek to grow AUM through referrals and by deepening share of pocket
- Maintain consistent, documented communications of all interaction and respond to client communication (both telephonic and electronic) within one business day
- Collaborate closely with team members to analyze existing clients financial situations and provide dynamic, objective and holistic plans to address their needs
- Provide asset allocation recommendations and portfolio analysis for clients
- Effectively promote the AXA Manasard Investment brand and strategy to both existing and prospective clients
- Execution of non-discretionary client mandates
- Prepare, organize and present investment strategy and reports on a periodic basis to the portfolio management team and CIO
- Prepare, review and update Investment Policy Statements (if necessary)
- Align with the corporate culture in a positive manner
- Ensure competence is attained and maintained, by undertaking training programmes and any additional developmental activities or specific personal development plan as required/agreed by/with the firm.
- Work within a collaborative framework and participate in all internal meetings, freely sharing developments, themes and investment ideas
- Ensure full compliance with regulatory and risk management guidelines in addition to the AXA group standards.
- Complete special projects as required from time to time.
- Any other responsibilities that might be required by the Business / Group Head/CEO from time to time.

Required Skills and Competencies

- Knowledge of Asset management industry/ Investment Management
- Intermediary level for excel database analysis
- Technology Savvy with strong Ms Office Skills (Word, Excel, Outlook, Visio)
- Intermediate background in the financial markets and asset management business and processes.
- Strong aptitude in decision-making, time management and problem solving.
- Understanding of financial market instruments.
- Be detail oriented.
- Confident
- Innovative
- Relationship management
- Time management

Interested Applicants should send their CVs to **jobtalentrecruit@axamansard.com** stating the role applied for as subject of mail. e.g., “**Financial Advisor/Non Discretionary Portfolio Analyst**”.