

## Junior Investment Manager (Winchester)

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Company: Montpellier Resourcing

Location: United Kingdom

Category: other-general

### Hybrid Working Available!

### Up to £35,000 plus EXCELLENT bonus and benefits

Are you looking to break into front office Investment Management? Do you have a keen interest and sound knowledge of the investment industry? Do you have experience in a client facing role in investment / financial services? **Then read on, and apply below!**

A boutique wealth management firm is seeking a Junior Investment Manager to join their team in Winchester to support with the management and ownership of the client lifecycle processes to ensure the delivery of a superior client experience.

#### **Duties of the Junior Investment Manager to include:**

Providing information to, and engaging with, clients and intermediaries, working to pre-empt issues, and resolving them appropriately and promptly.

Assist the Investment Management team in ensuring Suitability. This will involve engagement with the client, establishing a clear understanding of their investment aims and risk appetite, and communicating any potential vulnerabilities.

Engaging with prospective and existing clients through presentations, performance reviews and cost illustrations to encourage opportunities for business growth.

Assist with the preparation of STAR reports for non-discretionary clients.

Compiling literature and coordinating research for team meetings.

Supporting with the management of the Annual Portfolio Review and Investment Admin

data for the team.

**Requirements for the successful Junior Investment Manager candidate:**

Sound existing knowledge and demonstrable interest in the investment industry and investment products.

Previous experience working within investments or financial services is essential

Educated to University Undergraduate degree level or equivalent

Working knowledge of asset classes and the investment process.

Ability to work collaboratively within a team and confidently independently.

Strong IT skills with ability to quickly adapt to new systems

This vacancy is being advertised by Montpellier Resourcing Associates Limited. The services advertised by Montpellier Resourcing Associates Limited are those of an Employment Agency.

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