

Job Title:	Team Lead, Asset Management
Department:	Sales & Distribution
Job Objective:	Sales and marketing of all Asset Management Products to Individual & Institutional clients
Reporting relationship:	Reports to Head, Sales & Distribution. Supervises a group of three (3)

Job Responsibilities

Strategy Development

- Responsible for sales and distribution of all Asset Management products of the firm
- Work with HOD to develop an Asset Management sales and marketing strategy for the firm.
- Work with HOD to develop the Asset Management Sales Budget

Business Development

- Investment Consulting Advisory – Portfolio analysis and construction
- Ability to create an open architecture investment forum where advisory services are offered and executed
- Full service Portfolio Management – Strategic allocation and implementation of effective portfolio management for clients to maximize their investment returns
- Trust and Philanthropic services – engagement of prospective clients for the set-up, administration of charitable trusts, endowments and private foundations
- Private banking services for large, strategic clients

Core Marketing

- Understanding and profiling asset management clientele
- Ensures up-to-speed understanding of the niche market and the right products to serve it
- Reaching out to High Net-worth Individuals and Institutional Investors
- Participating in forums and seminars to enhance the growth and visibility of the Asset Management business
- Proposal writing and presentations ensuring senior management approvals before issuance
- Constantly giving supervisors/colleagues market feedback to enhance product development
- Cross-selling our products from other departments to Asset Management clients

Relationship Management

- Cultivating and maintaining sound business relationship
- Ensuring that client mandates are executed timely
- Ensuring there is a feedback mechanism in place for effective relationship management
- Ensuring that KYC principle in new accounts are complied with
- Following up to ensure prompt resolution of clients queries

Key Performance Indicators

- Volume of Discretionary Portfolio accounts generation
- Volume of Non-discretionary Portfolio accounts generation
- Number of Foundations/Endowments set up in a year
- Number of Asset Management clients cross-sold to other parts of the business
- Quick turnaround time on transactions and excellent generation of internal and external reports

Competence Requirements (Generic & Core Skills)

- Analytical thinking and results oriented
- Pro-activity and Interpersonal Skills
- Ability to work with team
- Good team leader/player
- Relationship Management
- Knowledge of Investment banking products
- Knowledge of characteristics of the various players in the Capital Market

Specification/ Qualification and Experience

- Minimum of a first degree in any discipline. At least 3-5 years experience in an Asset Management or Investment Banking firm, working largely on the sell side