



## Investment Management Client Services Analyst

Financial Marketing, Distribution and Sales, Client Relationship Management

We have an opportunity for an ambitious recent graduate looking to kick-start their career in investment management. The opportunity is for an Analyst role within the Client Services team and we are looking for someone who is immediately available.

The Client Services team is central to the functioning of our business; in summary, the team is responsible for growing and maintaining Record's client base. Together the team (a) prepares proposals for prospective clients; (b) responds to enquiries from our existing clients; (c) develops marketing presentations for prospective and clients.

The successful candidate will be ready to quickly build up a broad understanding of our business through intensive training and coaching, so enjoying fast-paced and challenging work is crucial. The opportunities to develop a thorough understanding of how an investment management company functions are wide-ranging because the Client Services team has extensive interaction with all other teams in the business as well as with our clients. You can expect to develop an understanding of teams including Investment Strategy, Research, Portfolio Implementation, Trading, Reporting, and Risk, as a wide and detailed understanding of what we do is essential for shaping our communication with clients.

### Record Currency Management:

Record Currency Management is an established, independent currency manager, managing approximately £56.61 billion (as at 31 December 2020) in client currency exposures. Our worldwide clients are largely institutions, including pension funds, charities, foundations, endowments, and family offices. Record's services include bespoke currency hedging, currency for return, and additional currency solutions and consulting services. Record's main office is in Windsor in the UK, and we also have offices in New York and Zürich.

You will be offered a package including a base salary, bonus, pension, private medical care, insurance, 25 days holiday, subsidised gym membership and a number of other salary sacrifice benefit options.

### Key Responsibilities:

- Initial drafting of Request for Proposal (RfP) documents, which will include collation of data and information and liaising with various internal departments,
- Screening, researching, providing information about prospective clients,
- Preparation of presentations in advance of meetings,
- Support the client follow up process, including taking responsibility for collating and writing information and materials to be sent to the prospect or client,
- Accessing and providing investment data from systems and other departments to obtain information as requested by a client or prospect or their advisers,
- Build and develop strong relationships with the other Client Services Analysts, Client Team Directors and all other internal departments such as Portfolio Management, Investment Strategy and Research.

### Requirements:

- Strong writing, research, and analysis skills; ideally experience of conducting independent research,
- Comfortable interpreting numerical data and quick to understand complex concepts,
- Excellent communication and interpersonal skills, works well in a team,
- Problem-solving skills,
- Excellent attention to detail.

Please apply via this link - <https://recordcm.peoplehr.net/Pages/JobBoard/Opening.aspx?v=c9776752-dd0b-4375-b044-4ce580598c57>

Start date: ASAP

Closing date: 15th April 2021