

JOB DESCRIPTION

JOB TITLE:	Consultant Database Trainee	APPROVED PERSONS CATEGORY:	Conduct Staff
DEPARTMENT:	Consultant Relations	REPORTING TO:	Head of Consultant Relations
RESPONSIBLE FOR:	N/A	PRESENT INCUMBENT(S):	

KEY RESPONSIBILITIES (in order of priority) – DEFINE DUTIES/ACTIVITIES IN DETAIL UNDER EACH POINT (eg Volumes, frequency, etc)

Summary

The purpose of this role is to co-ordinate and complete the databases that are utilised by the investment consultants and a range of large institutional investors. Institutional investors require us to complete performance, asset under management, characteristics data (risk, exposures etc) and narrative on investment processes and ESG/sustainability on a regular basis within databases. The databases are the initial shop window for our strategies with a number of investors, so getting the data correct and to as high a possible standard will help in raising the business profile and help to raise assets. This role will require someone to actively engage with many parts of the LOIM business, to ensure accurate and consistent data is received in a timely manner, then entered into the databases. Any element that can be automated the individual can look to find a process to instil this to free up more time. The role will give the individual an excellent grounding in all elements of asset management from business management to underlying investment processes and how that feeds into the overarching sales process.

1. Key Responsibilities

- Centrally coordinate completion of a number of key institutional databases with key data across a very wide range of LOIM strategies.
- Performance, AUM, Characteristics, Risk, Finance, Process, ESG, Sustainability data and wording will all be required so a lot of interaction across the firm will be important
- Liaise with internal stakeholders to ensure receive data in a consistent manner and on time.
- Look to automate as much of the process as possible.
- Collate most up to date 'static' data with key process explanations, ensuring can be left for around a year prior to next update

2. Management and Reporting

- Report to the Head of Consultant Relations.

This list is not exhaustive the Company reserves the right to amend roles and responsibilities at any time in accordance with departmental requirements

3. Risk

- Look to ensure that data is completed accurately, attempting to avoid as much manual input as possible by automating regular updates as much as is possible. If entering manual data ensure that a checking procedure is put into place utilising the performance team as a second set of eyes.

4. Communication

Key Internal Contacts

- Consultant Relations team
- Performance team
- Finance team
- RFP team
- HR team
- Sustainability team
- Product Specialists

Key External Contacts

- Database providers

5. Systems Used

- Excel
- External databases
- Word
- Internal performance systems

6. Legal and Regulatory Responsibilities

- Comply with all applicable legal, regulatory and internal Compliance requirements, including, but not limited to, the LOAME Compliance manual and Compliance policies and procedures as issued from time to time: Financial Security requirements, including but not limited to, the prevention of Financial Crime and Fraud including reporting obligations to the Money Laundering Reporting Officer.
- Maintain appropriate knowledge to ensure to be fully qualified to undertake the role. Complete all mandatory training as required to attain and maintain competence.

Investment20/20 Programme information

You will join as a trainee as part of the Investment20/20 programme. While we can't guarantee a permanent position at the end of the 12-month contract, it is our intention to make the offer, but this is up to how well you perform. 75% of Investment20/20 trainees are offered permanent positions.

Our traineeship will introduce you to investment management and you will gain industry knowledge, experience and develop relationships enabling you to progress your career and provide you with skills to secure a permanent role. As part of the Investment20/20 programme, you will have opportunities to meet and network with over 100 trainees across the industry and participate in socials and insight events.

Our trainee programme is a fixed term one-year contract paying up to £30,000 per year. You will receive 25 days annual leave. All roles are based in London. This is a programme intended to give you a breadth of knowledge and experience within the business to enable you to make informed decisions about where you would like to develop your career.

This list is not exhaustive the Company reserves the right to amend roles and responsibilities at any time in accordance with departmental requirements

SIGNED BY MANAGER:	POSITION:	DATED:
SIGNED BY EMPLOYEE:	POSITION:	DATED:

PERSON SPECIFICATION

	KNOWLEDGE AND SKILLS	
	ESSENTIAL	DESIRABLE
Qualifications/Education Required	<ul style="list-style-type: none"> • Open to school/college leavers (year 13+) and graduates 	
Experience Required	<ul style="list-style-type: none"> • N/A 	
Specialist Training Required	<ul style="list-style-type: none"> • Internal training of performance systems and training on the databases and how they work will be provided. 	
Approved Person Registration	<ul style="list-style-type: none"> • Conduct Staff 	
Competencies required	<ul style="list-style-type: none"> • Excellent organizational skills and ability to multi-task • Ability to liaise with many stakeholders • Detailed-oriented with strong problem-solving skills • Proactive, self-starter with strong problem solving skills 	
Skills & Knowledge Requirements	<ul style="list-style-type: none"> • Proficient in Excel • Fluent in English (written and spoken) 	
Any other relevant information		

This list is not exhaustive the Company reserves the right to amend roles and responsibilities at any time in accordance with departmental requirements

How to apply

As part of your application, please answer these three questions below in 250 – 300 words each answer.

1. Why are you applying to Lombard Odier Asset Investment Managers and what do you understand about the Consultant Database Associate role? (250 – 300 Words)
2. What is your greatest achievement? (250 – 300 Words)

Send your answers along with your CV to LOIM-HR-London@lombardodier.com

Key Dates:

Closing Date: 27th October 2021

*Please note we recruit on a rolling basis and will interview preferred candidates as they apply. We advise that you apply early as this position could close early, before 1st October.

Start Date: ASAP

This list is not exhaustive the Company reserves the right to amend roles and responsibilities at any time in accordance with departmental requirements