

## Investment Manager

<b>Company</b>	Walker Crips Investment Management Limited
<b>Job Title</b>	Investment Manager
<b>Department</b>	Investment Management
<b>Type</b>	Full Time
<b>Location</b>	Truro
<b>Closing Date</b>	Open until filled

<b>Objective</b>
To manage client investment portfolios.

<b>Key Responsibilities</b>
<ul style="list-style-type: none"> <li>• Managing and advising: Discretionary, Advisory, Managed and Execution Only client investment portfolios;</li> <li>• Placing deals resulting from portfolio reviews;</li> <li>• Placing Option/derivative trades when required;</li> <li>• Complying with FCA legislation / Walker Crips dealing rules;</li> <li>• Assisting Other members in developing product knowledge;</li> <li>• Daily departmental administration;</li> <li>• Investigating and dealing with client queries;</li> <li>• Validating client holdings;</li> <li>• Liaising with external clients and placing Equity and Bond orders;</li> <li>• Manage equity/bond/unit trust sales for probates;</li> <li>• Opening new client accounts in a compliant manner;</li> <li>• Liaise with back office to ensure effective settlement of bargains;</li> <li>• Instruct cashiers to move funds for clients as requested;</li> <li>• Report to your line manager any information which it would be reasonable to assume would be of material significance;</li> <li>• Dealing with any other roles the Manager deems necessary.</li> </ul>

**Education & Experience**

- Experience in managing private clients' portfolios;
- Must hold a valid qualification and Statement of Professional Standing to provide advice to private clients;
- Clear understanding of financial markets;
- Understanding of other financial products including ISA's, Unit Trusts, Investment Trusts and Child Trust's Funds;
- Able to use Factset, Proquote, Bloomberg.

**Person Specification**

- **Interpersonal skills:** Good interpersonal skills in handling clients and colleagues alike. To work effectively as part of a team;
- **IT/Organisational skills:** Good organisational skills, excellent timekeeping, attention to detail and self discipline, thorough knowledge and experience of Microsoft Office products;
- **Judgment & Analysis:** Has the ability to assess information, review options, make appropriate decisions and understand consequences within a regulated environment. Resilient and able to work in a fast paced, pressurized environment is paramount;
- **Initiative:** Capable of taking responsibility for own work and actions and can show initiative and resourcefulness. A self-starter able to work with a degree of day to day autonomy;
- **Communication:** A high level of written and verbal communication skills and the ability to communicate well at all levels in a clear, appropriate and timely fashion combined with the ability to prioritise workload.