

Senior Investment Manager – Jersey

Reporting to the Head of Discretionary, Jersey, the Senior Investment Manager, Jersey will be part of the discretionary investment team and will ordinarily be based in the Jersey office.

The senior investment manager will be responsible for managing a book of existing client and intermediary relationships, helping with NBD activities to grow the discretionary business in Jersey as well as seeking cross selling opportunities for the broader range of Ravenscroft investment services and products. This may include supporting growth initiatives outside of Jersey.

Additionally, the senior investment manager will be required to contribute to the discretionary investment process and undertake other tasks as required from time to time.

KEY RESPONSIBILITIES:

- Assist Head of Discretionary, Jersey to grow the Discretionary Investment Management presence and business. This will be focussed on Jersey but may also include assisting with growth initiatives outside of Jersey such as our desire to grow our presence in South Africa.
- Ensure the proactive handling of client relationships and the smooth operation of the account opening procedure for new clients whilst operating in keeping with Ravenscroft policy and guidelines.
- Conduct presentations to potential clients and trustees. Meet and communicate with potential and existing clients to understand their investment aims and objectives.
- Respond to client requests and queries in a timely manner. Ensure accurate reporting of client meetings and document the suitability of advice where appropriate.
- Provide information on the full range of Ravenscroft products and services to new business prospects.
- Maintain a full understanding of Ravenscroft's investment offering and process. Become product specialist for the Jersey office for the Ravenscroft Global Solutions strategy.
- Engage with the Investment Process by being part of Ravenscroft's Investment Committee, where appropriate undertake investment research, discuss market outlook, asset allocation and other investment related matters.
- Undertake miscellaneous tasks as agreed from time to time.
- Undertake CPD, maintain Investment qualifications and undertake any additional training as required by local regulatory requirements.