

SKILLS FRAMEWORK FOR FINANCIAL SERVICES SKILLS MAP - HEAD OF PORTFOLIO MANAGEMENT				
Sector	Financial Services			
Track	Product Solutioning and Management			
Occupation	Portfolio Manager			
Job Role	Head of Portfolio Management			
Job Role Description	<p>The Head of Portfolio Management drives the organisation's strategy and frameworks for managing client relationships. He/She ensures that processes run smoothly and efficiently. He promotes a culture of collaboration to deliver the best services possible. He prioritises deep industry learning and knowledge to ensure quality of information presented to clients. He establishes investment strategy decisions of the organisation to ensure his team members are aligned to organisation, market and industry standards. He is focused on developing new processes that will improve the efficiency of his team members.</p> <p>The Head of Portfolio Management is analytical and detail oriented but also a strategic thinker to determine how to improve the organisations performance. He is a leader and committed to supporting his team in their development and execution of their tasks. He is able to communicate and promote the organisations vision. He leverages relationships with various stakeholders to drive collaboration. He remains abreast of global and market trends.</p> <p>The Head of Portfolio Management is required to acquire specific portfolio management and product knowledge and this can include either one or a combination of: alternatives, derivatives, equity, fixed income, and private equity products.</p>			
Critical Work Functions and Key Tasks / Performance Expectations	Critical Work Functions	Manage client relationships	Key Tasks	
			Define frameworks and guidelines for team members to adhere to when managing client interactions	
			Oversee responses to escalated client portfolio issues and determine root causes for recurring problems	
			Establish organisation standards for investor communications	
	Present information to relevant stakeholders	Drive internal sales, relationship management and marketing team collaboration to identify opportunities and efficiencies in the organisation		
		Formulate organisation's client presentation strategies for team members to adhere to		
		Anticipate client needs and concerns prior to onboarding to provide necessary level of information to ensure client confidence in the organisation		
		Lead best practices for maintenance of deep portfolio understanding to provide enhanced client guidance		
		Oversee content and quality standards of product factsheets that are distributed to clients		
	Execute strategic decisions and evaluate performance	Define organisation's guidelines for client reporting requirements		
		Prioritise learning and development of team members to ensure that they remain updated on the latest information and trends		
		Define organisations investment strategies and articulate them to team members for execution		
		Endorse organisation's financial analyses and investment processes		
		Define organisation's criteria for portfolio strategies to manage financial and/or operational performance		
	Establish evaluation criteria to measure performance			
Skills and Competencies	Technical Skills and Competencies		Generic Skills and Competencies (Top 5)	
	Account Management	Level 5	Leadership	Advanced
	Attribution Analysis	Level 5	Problem Solving	Advanced
	Behavioural Finance	Level 4	Developing People	Advanced
	Business Environment Analysis	Level 5	Decision Making	Advanced
	Change Management	Level 5	Interpersonal Skills	Advanced
	Client Investment Suitability	Level 4		
	Customer Acquisition Management	Level 4		
	Customer Experience Management	Level 4		
	Customer Relationship Management	Level 5		

Skills and Competencies	Data Storytelling and Visualisation	Level 5		
	Deal Syndication and Arrangement	Level 4		
	Ethical Culture	Level 5		
	Environment and Social Governance	Level 5		
	Market Research and Analysis	Level 5		
	People Performance Management	Level 5		
	Pricing Strategy	Level 5		
	Product Advisory	Level 5		
	Regulatory Compliance	Level 5		
	Risk Management	Level 4		
	Trading Management	Level 5		
Programme Listing	For a list of Training Programmes available for the Financial Services sector, please visit: www.skillsfuture.sg/skills-framework/financial-services			

The information contained in this document serves as a guide.