SKILLS FRAMEWORK FOR FINANCIAL SERVICES SKILLS MAP- CLIENT PORTFOLIO MANAGER	
Sector	Financial Services
Track	Product Solutioning and Management
Occupation	Portfolio Manager
Job Role	**Client Portfolio Manager**
Job Role Description	The Client Portfolio Manager is responsible for managing client relationships including sharing details about investment strategies to align with client portfolio needs. He/She presents information to clients to ensure they are fully updated about their portfolio as well as answers any questions they have. He possesses deep understanding about the market and the organisation's investment philosophy to be able to effectively communicate with new and existing clients. The Client Portfolio Manager possesses strong communication skills to engage with a variety of stakeholders to meet necessary timelines. He is analytical, organised and able to set goals personally and present information in a logical manner. The Client Portfolio Manager 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.

Critical Work Functions and Key Tasks / Performance Expectations

Critical Work Functions	Key Tasks
Manage client relationships	Respond to client enquiries and requests
	Address escalated issues relating to client portfolios
	Coordinate dedicated investor communications
	Present investment strategies and capabilities internally to sales, relationship management and marketing teams
Present information to relevant stakeholders	Conduct client presentations to provide them with necessary information prior to onboarding
	Maintain deep portfolio understanding to provide assurance to clients regarding their portfolio
	Provide product factsheets to clients
	Facilitate client reporting including monthly reports
Manage investment strategies	Ensure alignment of investment strategies with client expectations
	Identify investment strategies and review portfolio positioning in order to meet client needs based on agreed upon guidelines
	Conduct portfolio reviews
	Assess risk profiles to ensure alignment with client expectations and portfolio requirements

Skills and Competencies

Technical Skills and Competencies		Generic Skills and Competencies (Top 5)	
Account Management	Level 4	Communication	Advanced
Attribution Analysis	Level 4	Decision Making	Advanced
Business Environment Analysis	Level 4	Interpersonal Skills	Advanced
Client Investment Suitability	Level 4	Service Orientation	Advanced
Customer Relationship Management	Level 4	Problem Solving	Intermediate
Data Storytelling and Visualisation	Level 4		
Ethical Culture	Level 4		
Market Profiling	Level 4		
Market Specialisation	Level 4		
Networking	Level 3		
People Performance Management	Level 4		
Portfolio and Investment Risk Management	Level 4		
Proposal Management	Level 4		

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	Regulatory Compliance	Level 4		
	Stakeholder Management	Level 4		
	Strategy Planning	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.

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