



## PORTFOLIO MANAGER'S ASSOCIATE

**Bermuda Investment Advisory Services Limited (BIAS)** is a full service Investment Management and Advisory group with companies in Bermuda and Cayman seeking an individual to join a team of energetic and committed professionals as a **Portfolio Manager's Associate**.

### **Responsibilities and Duties include:-**

- Prepare account opening and all other documentation, including appropriate 'know your client' information to enable clients to operate their securities' accounts.
- Perform all routine customer service including checking activity, answering enquiries, and fulfilling other client requests.
- Provide administrative support to portfolio managers including conducting portfolio analytics, reviewing and analyzing client portfolios as well as scheduling and preparing documentation for all.
- Assemble and file research as well as take the minutes of the investment committee meetings.
- Prepare documentation relating to securities trading and follow up to ensure trades have been correctly executed, filed and accounted for.
- Document client instructions in our proprietary client management system and monitor accounting records to ensure accuracy and that funds are available for the purchase of securities.
- Execute trades on a timely, efficient and accurate basis.
- Prepare market report at the end of business day.
- Various projects related to BIAS investment products.

### **Educational and Work Requirements include:-**

- At least three years of relevant investment industry relevant experience as well as **at least** a CFA Level II pass
- Strong written and verbal communication skills are essential.
- Strong analytical skills with the ability to develop concise narratives based on the data
- Must be professional and comfortable dealing with clients and be a 'people person'.
- Excellent PC skills, especially knowledge of Excel and other Microsoft Office Software including Portia & Goldmine.
- Willingness to work long hours as necessary, particularly at quarter end.

If you are looking for a rewarding and challenging career, please submit your resume to:

Human Resources, Bermuda Investment Advisory Services Limited  
Wessex House, First Floor, 45 Reid Street, Hamilton HM 12, Bermuda  
Or by fax to 1-441-292-7292; or email: [recruiting@bias.bm](mailto:recruiting@bias.bm)

Closing Date: February 7, 2014

*BIAS is an equal opportunity employer*

Licensed to conduct investment business by the Bermuda Monetary Authority