

## Client portfolio analyst

Proficiency level

New Gen AI skills

Transferrable skills at the same proficiency level

New skills

Transferrable skills at a higher proficiency level<sup>1</sup>

<b>Skills Framework track</b>	Product solutioning and management	<b>Job function</b>	Customer operations	<b>Job family</b>	Client portfolio
<b>Sub-sectors</b>	Asset management	<b>Expected augmentation by Gen AI</b>	<b>Do more and do new:</b> Gen AI can help generate product factsheets and enhance the review of portfolio risks. Gen AI tools can also gather and package information for client presentations and investor communications, which can be queried directly by clients on a real-time basis		

### Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Manage investment strategies	Analyze data on investment strategies to share with senior team members Review factsheets and confirm information provided to clients Analyze portfolio requirements for potential risks Assist with portfolio reviews
Present information to relevant stakeholders	Assist in the preparation of product factsheets Develop understanding of client portfolio to provide assistance to team members in guiding clients Gather information for client presentations Assist in the preparation of monthly client reporting
Manage client relationships	Respond to requests from senior team members in preparation for presentations to internal teams Assist in gathering documents and information to respond to client inquiries and requests Support preparation of dedicated investor communications

### New Gen AI skills

Prompt design	2	<b>Role 1: Know your customer / Customer due diligence analyst (adj<sup>2</sup>. Score: 0.55)</b>			
Gen AI principles and applications	2	Ethical culture	3	Account management	3
Ethical and responsible Gen AI adoption	2	Stakeholder management	3	Customer relationship management	3
		Regulatory compliance	3	Customer acceptance checking and onboarding	2
		Taxonomy application	3	Data governance	3
		<b>Role 2: Product development analyst (adj. Score: 0.45)</b>			
		Ethical culture	3	Non-financial-industry sustainability developments	3
		Market profiling	3	Sustainable investment management	3
		Business environment analysis	3	Continuous improvement management	3
		Regulatory compliance	3	Data analytics and computational modeling	3
		Taxonomy application	3	Innovation management	3
		Climate change management	3	Sustainability risk management	3
		Natural capital management	3	Market research and analysis	3

DO MORE AND DO NEW

1. Transferrable skills with an increase in one level of proficiency is considered easier to acquire than transferable skills with multiple levels of increase in proficiency, followed by net new additional skills. Depending on job redesign for the financial institution, the financial institution will have to pick select skills to reskill employees on, via a combination of on-the-job training and existing courses.

2. Skills adjacency score.

Source: SkillsFuture Skills Framework