Client portfolio manager

Proficiency level

X	New Gen AI skills	X	Transferrable skills at the same proficiency level
X	New skills	X	Transferrable skills at a higher proficiency level[1]

Skills Framework track	Product solutioning and management		Job function	Customer operations		Job family	Client portfolio

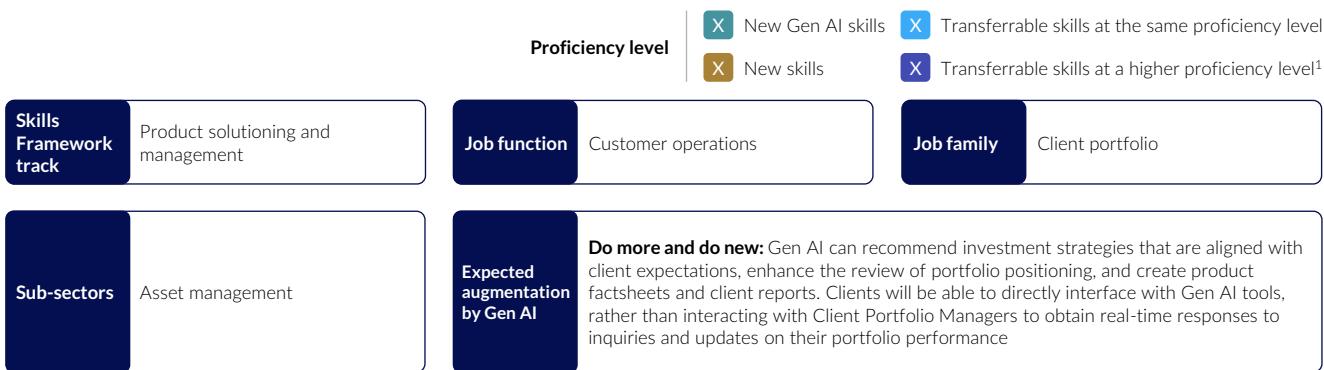| Sub-sectors	Asset management		Expected augmentation by Gen AI	**Do more and do new:** Gen AI can recommend investment strategies that are aligned with client expectations, enhance the review of portfolio positioning, and create product factsheets and client reports. Clients will be able to directly interface with Gen AI tools, rather than interacting with Client Portfolio Managers to obtain real-time responses to inquiries and updates on their portfolio performance

Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
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
	Assess risk profiles to ensure alignment with client expectations and portfolio requirements
Present information to relevant stakeholders	Maintain deep portfolio understanding to provide assurance to clients regarding their portfolio
	Provide product factsheets to clients
	Facilitate client reporting including monthly reports
	Conduct client presentations to provide them with necessary information prior to onboarding
Manage client relationships	Present investment strategies and capabilities internally to sales, relationship management and marketing teams
	Coordinate dedicated investor communications
	Respond to client inquiries and requests

New Gen AI skills

Prompt design	3
Gen AI principles and applications	3
Ethical and responsible Gen AI adoption	3

Additional skills required for potential redesigned role

Role 1: Business manager (adj[2]. Score: 0.50)

Ethical culture	4	People performance management	4	Sales target management	4
Stakeholder management	4	Strategy planning	4	Risk management	4
Regulatory compliance	4	Sustainable investment management	3	Business process re-engineering	4
Climate change management	3	Business requirements mapping	4	Project management	4
Natural capital management	3	Business performance management	4	Disruption management	5
Non-financial-industry sustainability developments	3	Continuous improvement management	4	Business planning	5

Role 2: Know your customer / Customer due diligence manager (adj. Score: 0.44)

Ethical culture	4	People performance management	4	Regulatory risk assessment	4
Stakeholder management	4	Taxonomy application	4	Continuous improvement management	4
Regulatory compliance	4	Customer acceptance checking and onboarding	3	Data governance	4
Account management	4	Sustainability risk management	3	Corporate and business law application	4
Customer relationship management	4	Regulatory and legal advisory	4	Service challenges	4

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

DO MORE AND DO NEW