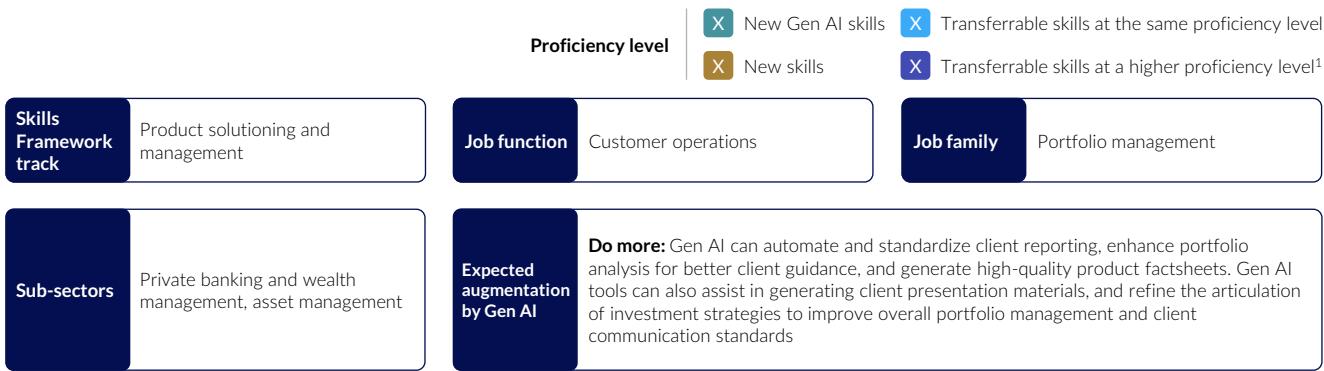


Head of portfolio management



Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Present information to relevant stakeholders	<p>Define the organization's guidelines for client reporting</p> <p>Lead best practices for maintenance of deep portfolio understanding to provide enhanced client guidance</p> <p>Oversee content and quality standards of product factsheets that are distributed to clients</p> <p>Formulate the organization's client presentation strategies for team members to adhere to</p> <p>Anticipate client needs and concerns prior to onboarding to provide the necessary level of information to ensure client confidence in the organization</p>
Execute strategic decisions and evaluate performance	<p>Define the organization's criteria for portfolio strategies to manage financial and/or operational performance</p> <p>Define the organization's investment strategies and articulate them to team members for execution</p>
Manage client relationships	<p>Define frameworks and guidelines for team members to adhere to when managing client interactions</p> <p>Establish organizational standards for investor communications</p>

New Gen AI skills

Gen AI strategy	5	Gen AI innovation, R&D, and innovation management	5	Prompt design	3
Leading Gen AI-enabled transformations	5	Ethical frameworks for Gen AI	5	Gen AI principles and applications	3
Gen AI data governance	5	Regulatory, legal, and risk management compliance in AI and Gen AI	5		

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.

Source: SkillsFuture Skills Framework