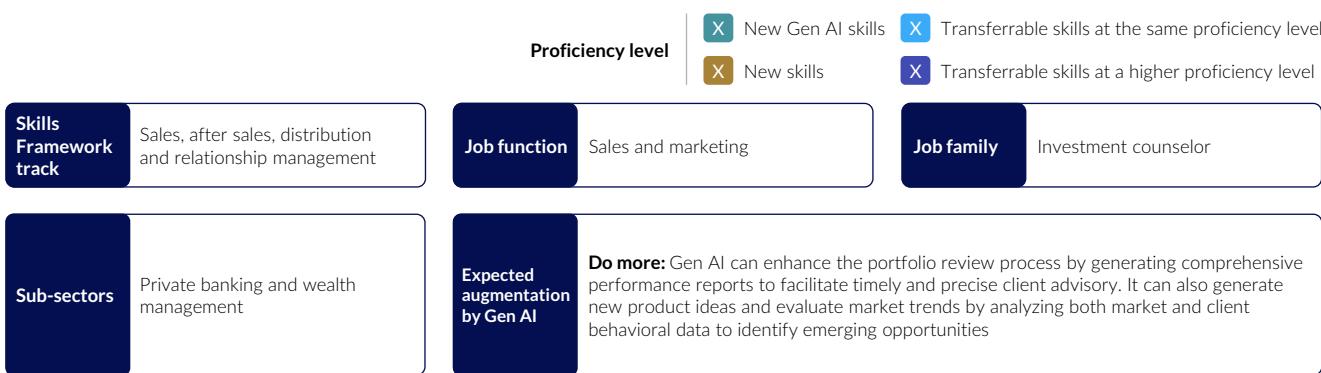


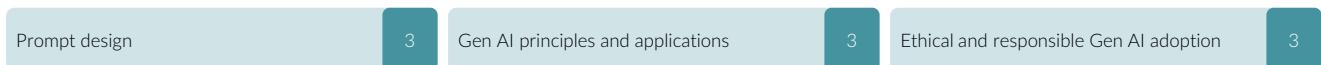
Investment counselor team lead



Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Partner with internal teams to develop and execute investment strategies	Endorse newly developed products and ensure adherence to regulatory requirements Lead new product idea generation and actively participate in product investment committee meetings Oversee the positioning of investment solutions delivered to clients
Review client portfolio performance	Oversee the accuracy and efficiency of the portfolio review process, and implement process improvements where identified Keep abreast of the latest market and economic trends and ensure valid valuations are provided to clients Ensure investment strategies are aligned to organizational policies and compliant with regulations
Provide product advisory services	Oversee advisory support systems for operational efficiency and client-centric culture Ensure advice provided meets clients' needs and investment objectives to maintain and build new client relationships

New Gen AI skills



DO MORE

Source: SkillsFuture Skills Framework