





Investment counselor team lead

Proficiency level

-  New Gen AI skills
-  Transferrable skills at the same proficiency level
-  New skills
-  Transferrable skills at a higher proficiency level

Skills Framework track	Sales, after sales, distribution and relationship management	Job function	Sales and marketing	Job family	Investment counselor
Sub-sectors	Private banking and wealth management	Expected augmentation by Gen AI	Do more: Gen AI can enhance the portfolio review process by generating comprehensive performance reports to facilitate timely and precise client advisory. It can also generate new product ideas and evaluate market trends by analyzing both market and client behavioral data to identify emerging opportunities		

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

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

Source: SkillsFuture Skills Framework