Investment counselor

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 and do new:** Gen AI can propose new product ideas, enhance the evaluation of portfolio performance with current market trends, and streamline the preparation of portfolio reviews. Gen AI tools can also facilitate the communication of product-related information to clients to improve the delivery of financial advisory services, and optimize asset allocation recommendations; outputs from Gen AI tools can also directly benefit clients

DO MORE AND DO NEW

Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Partner internal teams to develop and execute investment strategies	Propose new product and trading ideas to product teams
Review client portfolio performance	Help clients evaluate portfolio performance in context with current market trends and conditions
	Prepare timely and accurate portfolio reviews
Provide product advisory services	Recommend appropriate asset allocation aligned to client needs
	Provide product-focused financial advisory services to clients referred from client-facing teams
	Communicate relevant and timely product-related information to client networks
	Provide portfolio construction services to clients referred from client-facing teams

New Gen AI skills

Prompt design	2
Gen AI principles and applications	2
Ethical and responsible Gen AI adoption	2

Additional skills required for potential redesigned role

Role 1: Assistant relationship manager - Private banking (adj.[2] Score: 0.60)

Ethical culture	3	Climate change management	3	Risk management	3
Stakeholder management	3	Customer relationship management	3	Customer experience management	3
Product advisory	2	Natural capital management	3	Cybersecurity	3
Account management	3	Non-financial-industry sustainability developments	3	Business negotiation	3
Business opportunities development	3	Sustainable investment management	3	Customer acceptance checking and onboarding	3
Carbon markets and decarbonization strategies management	3	Service challenges	3	Sustainability stewardship development	3
Client investment suitability	3	Market specialization	3		

Role 2: Product marketing executive (adj. Score: 0.40)

Ethical culture	3	Sustainable insurance and re-insurance solutions and applications	3	Digital marketing	3
Stakeholder management	3	Demand and supply analysis	3	Market profiling	3
Business environment analysis	3	Customer behavior analysis	3		
Market research and analysis	3	Product marketing and branding	3		

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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