

RFP & REPORTING SPECIALIST
REF #5743

Request for Proposal (RFP) & Reporting Specialist is needed to assist the firm in its reporting and communications efforts.

This includes responding to customized RFPs and Due Diligence Questionnaires (DDQs), maintaining Consultant Databases, and providing ad-hoc communications support for their Client Service and Portfolio Management teams.

You will master these responsibilities by developing strong working relationships with their Investment and Operations professionals, as well as with their Legal and Compliance teams.

DUTIES:

- Completing RFPs, Requests for Information (RFIs), and DDQs for existing clients, consultants, and prospects, in a thoughtful, accurate, and timely manner
- Managing and completing consultant databases and consultant questionnaires
- Thoroughly understanding products and services and staying current on portfolio strategy in order to effectively represent the firm
- Collaborating with all departments in the firm
- Involvement in the development and streamlining of the firm's customized reporting processes
- Taking ownership of content and data management and being the trusted source for data and information for the firm
- Maintaining involvement in various firm-wide initiatives and projects, including those that pertain to data integrity and communication best practices
- Upholding a working knowledge of client and intermediary relationships through continued interaction with the client team and the use of CRM system

QUALIFICATIONS:

- B.A. / B.S. degree
- Experienced RFP and/or DDQ professional with at least three years of investment industry experience
- Strong understanding of domestic, international, and global equity and fixed income products
- Excellent time management skills; ability to complete simultaneous assignments with moving priority levels; project management skills
- Exceptional verbal and written communication skills; strong proofing and editing skills are essential
- Proficiency with Excel; familiarity with Evestment Alliance, and experience using RFP software such as PMAPS or Qvidian, is highly desirable
- Experience with UCITS Funds a plus

SEND RESUME AS AN MS WORD ATTACHMENT TO diane@dmstone.com

