PORTFOLIO MANAGER CV

In making a Portfolio Manager CV, it is best to have a skills section that would reflect your areas of expertise at first glance. You can impress potential employers by presenting information such as experience in asset, insurance, and investment management as well as an extensive exposure in the banking and Matrix environment. Skills such as of project management underwriting, operations management, new product development, sales & marketing is also a plus. Presenting a detailed summary of all your related professional experience in reverse chronological order reflects credibility. Make a CV that will stand out by following the CV of a Portfolio Manager below.

Nehru Buckley

P.O. Box 395, 5372 Commodo St., Ellesmere Port, Cheshire, GU8E 6FZ

Tel: – 01964 337064 [email]

Date of Birth: – 08/02/91 Nationality: – British

CAREER OBJECTIVE:

My primary goal as a Portfolio Manager is to maximize clients' net income and place investments on fields with optimum performance which significantly outweighs the risks. Equipped with strong background in the banking industry, as well as asset, insurance, and investment management, I am positive that this objective can be achieved. As a Portfolio Manager, I aim to place the clients' best interests first in making financial judgments and in presenting investment policy statements. Aside from this, I also aim to further my understanding of the investment and banking industry and enhance my skills and objectivity in the implementation of portfolio adjustments.

SKILLS:

- Good experience in managing client portfolio
- Sound knowledge of asset management and financial modeling techniques
- Wide knowledge of client relationship management procedures
- Familiarity with insight and campaigning operations
- Ability to oversee new product development and marketing activities.
- Ability to develop RFP and develop financial forecast

PROFESSIONAL EXPERIENCE:

Portfolio Manager | Legal & General Group Plc. – Kingswood | Apr 2013 – Present

- Identified business drivers and provided investment ideas.
- Provided support in making capital investment decisions.
- Participated in risk assessment and management activities.
- Reviewed and recommended improvement to portfolio strategy.
- Negotiated with clients and maintained productive and positive client relationships.
- Developed marketing plan to meet revenue goals.

Portfolio Manager | Macquarie Group Limited – London | Oct 2012 – Apr 2013

- Managed customer outreach activities to improve brand awareness.
- Involved in sales planning operations to achieve profitability.
- Identified business, operational and financial risks and developed remedial actions.
- Ensured that client portfolio management activities are in compliance with company policies.
- Maintained good working relationships with clients.
- Developed training programs for sales and marketing teams.

EDUCATIONAL BACKGROUND:

BA (Hons) in Accounting and Financial Management
University of Central Lancashire – Preston
Oct 2009 – Jul 2012
A-levels: Economics, History, Mathematics, English Language
Macclesfield College – Macclesfield
Sep 2007 – Jul 2009
GCSEs: Maths, Physics, English Language, Chemistry
The Charter School – Dulwich
Sep 2002 – Jul 2007

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