

Portfolio and Platform Operations Manager

The role is to manage and own the operational aspects of our Managed Portfolio Service and related platform administration. It forms part of the operations team and involves working closely with the Head of Operations.

Overview of Role

- Establishing and managing relationships with platform providers
- Storage and updating of platform knowledge including detailed how to guides and differences between platforms
- Setting up portfolios on platforms
- Liaising with the Investment Management Team to implement portfolio changes and updates on platforms
- Ensuring that platforms are supporting/discharging Square Mile's regulatory responsibilities
- Ensuring that portfolios are aligned to models across platforms
- Reporting to the operations team of any updates or changes to platforms and their impact on the Managed Portfolio Service
- Knowledge and understanding of Portfolio Management System
- Managing the overall support process and communication between teams and clients in the portfolio process

Skills and Experience

- A number of years of experience on platforms, a knowledge of centralised investment propositions and the management of model portfolios on platforms.
- Excellent time management and works in an organised and efficient way
- Strong attention to detail
- Good knowledge of fund platform administration
- Able to work confidently as part of a team or independently

About Square Mile

Square Mile is an independent investment research business that works in partnership with regulated professional financial services firms. We help advisers to develop informed investment recommendations so that, with their support, their clients can make the decisions that are right for them. Focusing first and foremost on in depth, qualitative fund research, we provide tailored support and investment services for financial advisers and institutions.

www.squaremileresearch.com

To apply please send a copy of your CV to Lisa Juniper, Head of Operations, Square Mile Investment Consulting & Research: lisa.juniper@squaremileresearch.com