



JOB DESCRIPTION

JOB TITLE:	Assistant Manager , Investor Services	JOB CODE:	
DEPARTMENT:	Investor Services - IAP	LOCATION :	Hong Kong
REPORT TO:	Manager, Investor Services	FLSA (US ONLY):	
DIRECT REPORTS:	No	REVISED:	July 2016

JOB PURPOSE (JOB SUMMARY):

Assist the Manager to supervise a team of Investor Services Executives in delivering high quality service and to manage outbound call programs for retention of existing members.

KEY RESPONSIBILITIES / DUTIES:

- Assist manager to supervise a team of Investor Services Executives in delivering high quality service to ORSO/MPF Scheme members and Invesco clients.
- Handle members/clients' complaints
- Identify service risk and recommend areas for change and improvement.
- Conduct call monitoring sessions on a regular basis and make necessary follow-up action.
- Keep abreast of the statutory requirements on products/ market movements in order to deliver ongoing training/ briefings to Investor Services Executives.
- Assist Manager to maintain and update call center procedures & manuals
- Work with IT and other related departments in setting up and maintaining the infrastructure and functionality of the service platform for the overall efficiency and effectiveness of operation
- Ensure system enhancements relating to new MPF requirements smoothly deployed by the required timeline.
- Make recommendations to improve functionalities and other workflows in relations to the service platform

WORK EXPERIENCE / KNOWLEDGE:

- At least 5 years' experience within a call center
- Understanding of the portfolio administration processes and systems
- License holders with SFC and MPFA
- Proficiency in financial industry and investment products
- Good command of written and spoken English, Cantonese and Mandarin

SKILLS / OTHER PERSONAL ATTRIBUTES REQUIRED:

Proactive with positive mindset, excellent interpersonal & communication skill

FORMAL EDUCATION:

- Tertiary Education, preferably under Finance or Business disciplines

Disclaimer: The above information on this description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities and qualifications required of employees assigned to this job. Incumbents may be required to perform other duties as deemed appropriate by the supervisor from time to time.