



## Investment Operations Technician

The Investment sector, as part of the Financial Services sector, specialise in investment management, trading and reporting activities. With the emergence of different forms of active and passive investments, including pensions and impact investing, now is an especially exciting time to work in Investment Operations, due to the vast array of products and services on offer. This may include institutional or retail clients, and may involve a local, national or a global client base. This could include a range of high-net worth individuals, businesses, collective investment schemes, pension funds, charities, corporations and governments.

An Investment Operations Technician would typically sit within the Operations department of an Investment institution, where they would be responsible for junior level activities, such as evaluating portfolio and investment success, preparing client reports, processing transactions and acting as a conduit between the trading activity and investment management team. This requires high levels of attention to detail, strong analytical skills and effective communication with a range of internal and external stakeholders.

### Programme Benefits and Outcomes

Your Investment Operations Technician will be able to;

- Develop a range of technical proficiencies, including but not limited to – Investment transaction matching, confirmation and settlement, Portfolio valuation, Portfolio cash reconciliation and management, Corporate actions processing, Preparation of internal and client investment reports, Processing significant changes to portfolios as instructed by clients or their authorised agents
- Understand how the skills fit your business needs and implement these effectively
- Develop outstanding professional conduct

### Nationally and Industry Recognised Qualifications

Alongside the programme, your employees will gain a Professionally recognised qualification to support their development, supporting your organisation in developed a high-skilled workforce.

# Continuation Courses for your Employees

## TEAM LEADING AND MANAGEMENT

Once proficient in a their role, with the skills, knowledge, behaviours and experience needed to thrive in a highly pressurised financial services environment, our tailored pathway courses support your organisation to further progress employees into higher level roles. We do this successfully through tailoring our programmes to the specific needs of your employees' development, alongside the detailed requirements of your business.

Successful completion of the Investment Operations programme can lead onto;

OPERATIONS MANAGER LEVEL 5

SENIOR INVESTMENT

INVESTMENT OPERATIONS  
SPECIALIST LEVEL 4

SENIOR INVESTMENT  
PROFESSIONAL LEVEL 7

## Programme Support and Additional Services

Our programmes are developed to support your business needs in developing the talent, skills and knowledge needed to help your business grow and succeed. Our Investment Operations Technician course also includes the following components;

### 18 months programme duration

supported through industry recognised qualification

### Dedicated Account Manager

monthly meetings to satisfy all your questions, feedback and communication needs

### Personalised coach, tutor and assessor

weekly contact for your employees 20% off the job training (face-to-face, virtual and telephone)

## Training Costs

**Levy businesses can use their contributions to pay for this training. The costs will be £9,000.**

If you are not a levy paying business there may not be a cost for this training. If the employee on this programme is under 19 and your business has less than 50 employees, there will be no cost for the training. If they are over 19 and/or your business has over 50 employees then you will contribute 5% towards the cost of the training which would be £450.

## Contact us

With Academies throughout the UK, get in touch today to find out how your employees can begin their journey, and how we can support your organisation with your workforce education and training

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