Job Description – Project Lead – Asset and Wealth Management

About us

Expand Research is a specialist firm that provides unique business intelligence and decision support services via benchmarking and market research across the global financial services industry. The majority of Expand's activities are focused on strategic cost and human resourcing benchmarking across a variety of financial services sectors.

We are a wholly-owned subsidiary of the Boston Consulting Group and are headquartered in London with offices in Singapore and New York. Our enthusiastic and committed team has a friendly, diverse small company feel with regular social events and a highly collaborative, professional, supportive and entrepreneurial working culture.

Purpose and scope

Responsible for being a subject matter expert with oversight and accountability for a large book of work, aligned to the Asset and Wealth Management sector. Successfully brings revenue growth and innovation to their domain and ensures successful completion of projects with experience and flexibility. Manages and coaches multiple individuals.

Description

The Project Leader has responsibility for strategic decision support, syndicated benchmarking and market research in the Asset and Wealth Management industry – specialising in the domains of Technology and Operations. The role involves the management of a team of analysts tasked with the delivery of analytical diagnostic reports to a range of Asset and Wealth Management clients globally. Your role will be to provide oversight, support and content expertise. A significant portion of the time spent in this role will include detailed discussions with our clients, enabling you to guide their C-suite in making strategic decisions using the insight you share. You will also play a leading role in hosting community forums, facilitating peer-to-peer discussions and sharing of industry best practice. We are looking for a proactive, curious and diligent individual; an analytical and articulate problem solver who will play a key role in the AWM Practice Area.

Requirements

Technical

- Expert/Advanced MS Office skills: especially Excel (including pivot tables and comfort with complex data sets) and PowerPoint
- Project management skills including resource and time management
- Ability to interrogate, interpret, analyse and model data to extract insights and answer clients queries
- Asset and/or Wealth Management industry expertise
- Broad knowledge of financial concepts in areas such as economics, financial reporting, and investment markets
- Optional but desirable: experience using SQL and VBA

Non-Technical

- Group presentation skills with C-suite clients
- Senior internal and external stakeholder management
- Deadline management
- Quick learner
- Leadership and management skills
- Strategic thinking skills
- Cooperative approach to broader firm objectives

Qualifications and Experience

- Strong Bachelor’s degree, preferably in a quantitative or analytical subject
- 5+ years’ previous work experience in consultancy, financial services or financial market research – Direct Wealth & Asset Management preferred