CFA Society Pakistan

Senior Investment Advisor

Al Meezan Investment Management Limited • Sialkot, Punjab, Pakistan (On-site)

About the job

Company Description Al Meezan Investment Management Limited is a leading Islamic asset management and investment advisory firm in Pakistan, formed as a joint venture between Meezan Bank Limited and Pakistan Kuwait Investment Company (Private) Limited. Incorporated in 1995, the company is registered with the Securities and Exchange Commission of Pakistan (SECP) as a Non-Banking Finance Company, authorized to provide asset management and investment advisory services. Al Meezan manages both discretionary and non-discretionary portfolios and is licensed as a Pension Fund Manager under the Voluntary Pension System Rules, 2005. The firm offers Shariah-compliant mutual funds and pension funds, guided by its Shariah Advisor, Dr. Muhammad Imran Ashraf Usmani. All products are subject to market risks, and clients are encouraged to review offering documents for details on investment policies, risks, and tax implications.

Role Description This is a full-time, on-site role for a Senior Investment Advisor based in Sialkot. The Senior Investment Advisor will provide individualized financial planning and investment advisory services to clients, including assessing client objectives, risk tolerance, and financial circumstances. Responsibilities include designing and recommending Shariah-compliant investment strategies, monitoring portfolio performance, and rebalancing portfolios as needed. The role involves regular client meetings, responding to inquiries, delivering high-quality customer service, and preparing clear reports and presentations on portfolio performance and market outlook. The Senior Investment Advisor will also collaborate with internal teams to ensure compliance

with regulatory and internal policies, and contribute to business growth through client retention and acquisition.

Qualifications

- Strong expertise in Financial Planning and Finance, with the ability to analyze client needs and develop tailored solutions.
- Proficiency in Investments and Investment Strategies, including portfolio construction, risk assessment, and performance monitoring.
- Demonstrated commitment to excellent Customer Service, with strong relationship-building and client communication skills.
- Bachelor's or Master's degree in Finance, Economics, Business, or a related field; professional certifications (e.g., CFA, CFP) are an advantage.
- Knowledge of Islamic finance principles and Shariah-compliant investment products is highly beneficial.
- Strong analytical, numerical, and problem-solving skills, with attention to detail and ethical decision-making.
- Ability to work on-site in Sialkot, manage multiple client portfolios, and meet deadlines in a fast-paced environment.

To apply:
https://www.linkedin.com/jobs/view/4469770277/