



Job Description

Title: Intern

Department: Marketing *2, Market and Competitor Insights *1, Product Development *1, Institutional *2, PI *1, Wholesale *1

Location: Taiwan

Reports To: Line Manager

About Fidelity International

Fidelity International offers world class investment solutions and retirement expertise. As a privately owned, independent company, investment is our only business. We are driven by the needs of our clients, not by shareholders. Our vision is to deliver innovative client solutions for a better future.

Our people are passionate, engaged, smart and curious, and we give them the independence and the confidence to make a difference. While we take pride in the excellence of our investment solutions and client service, we know we can always do better. We are honest, respectful and make tough calls, challenging the status quo to achieve better outcomes through innovation. Above all else, we always put our clients first.

Find out more about what we do, our history, and how you could be a part of our future at <http://www.fidelityrecruitment.com/asia-pacific/about-us>

Our Values

All of our people must be able to demonstrate affinity with the Fidelity core values:

Innovation – Being willing to experiment and try new and better ways to serve our clients.

Integrity – Taking personal responsibility for always acting in the best interests of our clients.

Excellence – Striving to be the best while knowing we can always be better next time.

Our Behaviours

All of our people must be able to operate in accordance with our behaviours:

Commitment – We are committed to our clients and proud to work for Fidelity. We push through obstacles to make things happen; we make decisions quickly and thoughtfully. We are individually committed to building a culture of excellence.

Collaboration – We collaborate with colleagues, seek alternative views, invite different ideas and always challenge traditional thinking. This approach allows us to create a whole that is much greater than the sum of its parts.

Client Focus – We are expected to, and measured on, our ability to put our client first. We go the extra mile to understand their needs and strive to exceed their expectations. We listen carefully, we communicate clearly, and we're quick to respond. We're respectful of the trust placed in us to manage their money.

Department Description (Marketing)

FIL is a marketing lead organization. The Taiwan marketing team is responsible for managing the Fidelity brand in accordance with global and regional guidelines, ensuring the Taiwan market is leveraging and building on Fidelity's brand strength in the marketplace. The marketing team is also responsible for developing and implementing the marketing strategy and activity for the various business channels, leading and working in close partnership with the distribution teams and regional marketing resources to develop and implement key initiatives that include above and below the line marketing activities.

1. Purpose of your role

The position is responsible for supports of global financial market research, product data preparation and regulatory required materials production for onshore and offshore funds. In addition, this position will be involved in fund related corporate action projects, marketing administration and ad hoc supports to fulfil business needs. The position needs to ensure that all the materials and info are delivered on time and to required standards.

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Key Responsibilities

- Support to deliver regular report production, including, but not be limited to, Daily Report write-up and website upload, weekly insight reports on macro-economic and investment trends.
- Support to produce marketing materials, including monthly fund factsheet, and weekly & monthly fund performance report.
- Support local regulation requirement, including Information To Investors (ITI), prospectus update, and monthly dividend component report.
- Support Chinese translation to the investment marketing materials developed by global.
- Support ad hoc marketing documentation for corporate action, marketing campaigns and investment forum.
- Provide supports to marketing events if required.

Experience and Qualifications Required

- Senior grade with financial major
- PC proficient (MSOffice, especial in Excel and PowerPoint)
- Above average ability to communicate effectively in English and Chinese (written and spoken)
- Strong logical reasoning, well organized, efficient and reliable
- Capable of managing multiple complicated tasks and responsibilities at the same time
- Knowledge about mutual fund industry is a plus
- Strong work ethics/Principles
- Communication skills
- Honesty & Integrity
- Team work skills
- Flexibility & Adaptability
- Proactive & Action-oriented
- Has good command of oral communication, and has passion to share viewpoints

2. Purpose of your role

The position is responsible to support Channel Marketing and Public Relation on various marketing activities to fulfil business goal. This position will be involved in PR materials preparation and monitors, digital communication maintenance and marketing materials development. The position needs to ensure that all the regulatory reporting and information is delivered on time and to required standards.

Key Responsibilities

- Support to prepare press release materials and produce media exposure monitor reports
- Support Channel Marketing on marketing campaigns and distributor sponsored programs for digital communication, website maintenance, marketing materials production, fund data preparation and event supports & coordination.
- Help Chinese translation to the investment marketing materials developed by global.
- Support marketing budget management, including expense claiming, accrual and budget report development.
- Support regulatory-required & marketing material filing
- Support ad hoc marketing documentation for corporate action, marketing campaigns and investment forum.
- Provide supports to marketing events if required.

Experience and Qualifications Required

- Senior grade with financial major
- PC proficient (MSOffice, especial in Excel and PowerPoint)
- Above average ability to communicate effectively in English and Chinese (written and spoken)
- Strong logical reasoning, well organized, efficient and reliable
- Capable of managing multiple complicated tasks and responsibilities at the same time
- Knowledge about mutual fund industry is a plus.
- Strong work ethics/Principles
- Communication skills
- Honesty & Integrity

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- Team work skills
- Flexibility & Adaptability
- Detail-oriented
- Proactive & Action-oriented
- Good command of oral communication, and passion to share viewpoints

Department Description (Market and Competitor Insights)

The Regional Marketing team is a newly created marketing resource within the Asia Pacific ex-Japan region designed to foster excellence in marketing strategy and execution through the development of regionally executed marketing programs and the provision of strategic and tactical support to country marketing teams in a range of functional disciplines. The Insights and Propositions Team is designed to harness information and insights from within Fidelity, combine these with world class regional research, analytics and insights to create strong competitive advantage across Fidelity's brand, thought leadership and investment marketing programs.

The purpose of this role is to provide day to day data cleansing and data management for reporting, interpretation and further analysis.

Purpose of your role

The position is responsible for data management for Market and Competitor Insights, ensure that all the data is organized and ready for further analysis.

Key Responsibilities

1. Work seamlessly with Associate Director - Market and Competitor Insights APxJ based in Taipei.
2. Work alongside with other relevant functions in the organization, including Country Marketing, IT, Sales and Product Development team.
3. Automate current manual process and meet key stakeholder's expectation
4. Support data management for Market and Competitor Insights function – data compiling & report production
 - i. Weekly business report
 - ii. Weekly fund performance report
 - iii. Monthly market share report/dashboard, for different Asian market where Fidelity operates
 - iv. Quarterly market trend analysis
 - v. Any other new reports and initiatives

Experience and Qualifications Required

- Solid background in computer science and/or information management
- Interested in financial sector and data science
- Proficient in MSOffice suite, particularly in Excel
- Proficient in VBA and SQL
- Fluent in English, in terms of speaking and writing
- Strong problem solving, logical reasoning, and attention to detail.
- Capable of managing multiple complicated tasks and responsibilities at the same time
- Knowledge about technical analysis and mutual fund industry is a plus.
- Strong work ethics/Principles
- Communication skills
- Honesty & Integrity
- Team work skills
- Flexibility & Adaptability
- Proactive & Action-oriented
- Has good command of oral communication, and has passion to share viewpoints

Department Description (Product Development)

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The Product Development team is responsible for the following key areas:

Product Idea, Generation, Design & Development

- To develop a strategic framework for managing product ranges that balances the needs of our customers across all channels with the commercial need of the Taiwan business for growth, and at the same time ensuring there is an appropriate level of risk management..
- To understand the changing dynamics of the market for the business.
- To assist in developing FIL's Taiwan product strategy

Channel Management

- To understand the product needs of the different channels - institutional, wholesale, personal investing - and to champion those needs to the business. To propose new product ideas on behalf of the distribution side of the business
- To monitor competitor launch activity in local countries and to feed this back to other parts of the business
- To maintain an awareness of growth and product trends on a channel basis, so that Fidelity is aware of changes in market needs in a timely manner and can react swiftly to address new opportunities with appropriate product solutions
- To understand the sales priorities and medium term strategies of key intermediary distributors and assist Sales in developing compelling product solutions that strengthen our relevance to the distributor's business

Product Management

- To conduct a periodic review of the product range to determine whether it is optimal, and make recommendations for Fund closures, mergers or rationalisation
- To conduct Post-Launch Reviews of all new Funds to ensure they have met their AUM and profit targets, and are positioned correctly in the market
- To conduct individual product health checks and recommend changes to existing distressed Funds, i.e., Funds that are not positioned correctly versus their peer group, or are not getting traction in the market

Product Delivery & Execution

- To manage the internal approval process for the:
 - Creation of new funds
 - Requests for seed capital
- To chair the New Fund Launch Committees, and coordinate the operational launch of funds in cooperation with the local teams, and the regional operations, compliance, IT, HR, sales, marketing and investment functions etc.
- To manage changes to existing funds, including:
 - Creation of new share classes
 - Changes of investment objectives or benchmarks

Purpose of your role

The position is responsible in administration and product/market research support function for Product Development. This position will support fund related corporate actions, administrative reports, market/product research and product material production, etc. And also to ensure that all the materials and info are delivered with good quality and on time.

Key Responsibilities

- Support any administration request for Product Development function eg. shareholder letter translation, TDCC announcement and filing etc.
- Produce market intelligence & product research reports
- Ad-hoc support on meeting materials or product proposal & backtesting, etc.

Experience and Qualifications Required

- Senior grade with financial major
- PC proficient (MSOffice, especial in Excel and PowerPoint)
- Above average ability to communicate effectively in English and Chinese (written and spoken)
- Strong logical reasoning, well organized, efficient and reliable
- Capable of managing multiple complicated tasks and responsibilities at the same time
- Knowledge about mutual fund industry is a plus.
- Strong work ethics/Principles
- Communication skills

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- Honesty & Integrity
- Team work skills
- Flexibility & Adaptability
- Proactive & Action-oriented
- Has good command of oral communication, and has passion to share viewpoints

Department Description (Institutional)

Institutional sales team provides mutual fund and mandate investment service to local institutional clients, including government funds, insurance companies, asset managers, and financial institutions. The team was established in 2002. Total AUM now accounts for around 42% of Taiwan AUM.

Purpose of your role

The Intern will act as an assistant for the entire institutional sales team, mainly in the financial market and fund research areas. The candidate also needs to provide administrative support.

Key Responsibilities

- Provide market research for regular reports and timely market update based on leading financial press.
- Conduct summary of market view from PMs' webcast and conference calls.
- Provide focus fund analysis
- Provide administrative support

Experience and Qualifications Required

- Knowledge of economy and financial market
- Excellent interpersonal skill and communication skill
- English proficiency
- Strong organization skill
- Attention to detail

Department Description (Retail - Personal Investing)

The team was established in 1990s in order to provide mutual fund investment service to high net worth investors. Currently the team has 9 full-time staff members in Taipei, 2 in Taichung, and 2 in Kaohsiung. The current business priority is to provide total-solution service by integrating Fidelity funds with third party products. Also, the team is now focusing on deepening client relationships through a series of loyalty programs to enhance sales productivity consistently.

Purpose of your role

The Personal Investing Intern is responsible for providing regular sales administrative functions to Personal Investing Sales Managers, including regularly prepare/update fund performance reports and product comparison, and translate/summarize investment communication related materials from IM Team to enhance overall sales productivity.

Key Responsibilities

Collect fund/market related information based on PI Sales and clients' request.
Summarize and translate internal investment communication reports

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Experience and Qualifications Required

Communication skill/administrative experience
Data collection capability/financial market knowledge
Attention to detail

Department Description (Wholesale)

The department is responsible for all the intermediary business under three main channels: Bank, Brokerage and Insurance.

Purpose of your role

The position includes internal tasks to achieve. Externally, assist WS and AA to prepare fund related materials requested by distributors to provide services and to deepen relationship with distributors. Internally, in charge of inventory management, cross department coordination and sales related documentation

Key Responsibilities

- Handle routine requests from distributors.
- Help sales team to administrate sales related documentation works.
- Cross department coordination to facilitate business development.
- Assist Sales event related processes.
- Inventory management
- Data collection & configuration

Experience and Qualifications Required

- Senior grade with financial major
- Above average ability to communicate effectively in English and Chinese (written and spoken)
- Comfortable with the Fidelity corporate culture of results-orientation, teamwork, professionalism, quality, thoroughness, process, risk management, and global presence
- Dynamic individual who is willing to accept new challenges and changes
- Well organized, efficient, reliable, and capable of managing multiple complicated tasks and responsibilities at the same time
- PC proficient (MSOffice)

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Required Positions

- (A) Marketing *2 (Working Hours: At least 2 full days per week)
- (B) Market and Competitor Insights *1 (Working Hours: At least 2 full days per week)
- (C) Product Development *1 (Working Hours: At least 3 half days per week)
- (D) Institutional *2 (Working Hours: At least 2 full days per week)
- (E) Retail - Personal Investing *1 (Working Hours: At least 3 half days per week)
- (F) Wholesale *1 (Working Hours: At least 3 half days per week)

The further detail of job description are contained in the following attachment.

How to Apply

Interested candidates should send your English and Chinese resumes (no more than 2 pages) to recruitment@fil.com before **April 7, 2016**.

Please use "Fidelity (apply Department) Intern Application- (your name)" as the E-mail heading, e.g., Fidelity Marketing Intern Application – Tina Chen