



Job Description - Taiwan Internship Programme 2020

Title: Intern (12 months part-time)

Department: Institutional, Investment Management, Marketing, Personal Investing, Product Development, Wholesale

Location: Taipei, Taiwan

Reports To: Line Manager

About Fidelity International

Fidelity International ("FIL") 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 for our clients.

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 fidelityrecruitment.com/asia-pacific/about-us

Our Values

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

Integrity – Doing the right thing, every time and putting the client first

Trust – Empowering each other to take the initiative and make good decisions

Our Behaviours

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

Brave - Challenging the status quo, being accountable and speaking up

Bold - Acting with conviction, encouraging diverse thinking and keeping things simple

Curious - Learning to do new things in better ways and encouraging fresh thinking

Compassionate - Having empathy, caring for colleagues, clients & community

Overview of the programme

Business with main focus on sales and marketing excellence is essential to the continuing growth of our business. These are the teams that develop new investment products, tell clients about them and manage relationships to make sure the right clients choose the right products. It's a varied and fascinating part of Fidelity International to explore as an intern.

What you'll be doing

This is a big opportunity to build your knowledge on products, various sales channels, marketing or customer services in this internship. We will assign you to one of the business departments where you will spend a year with us.

Interns will be assigned to one of the following departments: Institutional, Investment Management, Marketing, Personal Investing, Product Development or Wholesale

Department Description (Institutional) *2

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. Client focus is our core by providing high quality service and investment solution.

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Purpose of your role

The Intern will act as an assistant for the entire institutional sales team, mainly in the financial market research and administrative support.

Key Responsibilities

- Provide market research and timely market update from leading financial press.
- Conduct summary of conference calls.
- Provide focus fund analysis.
- Provide support for mandate services
- 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 (Investment Management) *2

Fidelity International set up its Taiwan office in 1986, with more than 30 years in the local market. Apart from distributing offshore funds, FIL Taiwan started its onshore investment business by establishing Fidelity Investment Securities Investment Trust Co., Ltd in 2002. As of November 2018, the assets under onshore management are about US\$1.58 billion with 6 onshore funds and 12 discretionary mandates.

Purpose of your role

- Regularly update fund's data to prospectus, slide deck and other regulator-quired or cross-team required documents.
- Support document preparation (IAR preparation or others) and filing (IAR, IDR, IER and loss reports...etc).
- Support investment guideline review & check
- Support building and maintain local research framework
- Competitors' product analysis aiming to assist IM understand what and how we are competing with.

Key Responsibilities

- Assist to check and review investment guideline and remind IM if necessary.
- Assist IM to complete administrative works.
- Prepare competitors' analysis report.

Experience and Qualifications Required

- Financial or business related major.
- Having communication and collaboration skills.
- Being conscientious and attaining to details.
- Higher Integrity.

Department Description (Marketing) *2

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.

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Key Responsibilities

- Mainly support product and market related marketing materials production, and marketing campaigns related activities.
- Support to deliver regular report production, including, but not be limited to, weekly insights, fund factsheets, fund flows, dividend table, and website upload.
- Support to update focus product material production and fund comparison
- Support Chinese translation to the product marketing materials developed by global investment teams.
- Support regulatory-required & marketing material filing.
- Support ad hoc marketing documentation for marketing campaigns and investment forum.
- Support payment and vendor process.
- Support marketing related admin process

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.

Department Description (Personal Investing) *1

The team was established in 1990s in order to provide mutual fund investment service to high net worth investors. Currently the team has 8 full-time staff members in Taipei, and 1 in Kaohsiung. The current business priority is to provide total-solution service by registered Fidelity funds. 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

Experience and Qualifications Required

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

Department Description (Product Development and Management) *1

The APAC Product Team has a clear mandate to provide a high-quality product strategy that positions FIL's APAC Business for growth in an evolving competitive environment. The APAC Product Group will be leading the development of FIL's Global Product Strategy in addition to supporting local regional distribution strategies. The development, iteration, and syndication of our Product Strategies will transpire through effective collaboration with our distribution teams, our investment teams as well as with a range of additional internal and external stakeholders. The APAC Product Team also maintains responsibility for Product related decision making, life-cycle range management responsibilities as well as for other areas of product-related governance and thought leadership.

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The Product Development and Management team in Taiwan is responsible for the following key areas:

Product Idea, Generation, Design & Development

- Drive the developing FIL's Taiwan product strategy in both short term (1Y) and mid to long term(2-3Y).
- Identify demand/ requirement for investment products and solutions through direct engagement and collaboration with the Distribution, Investment and research teams.
- Manage and direct the development of new business cases for the Taiwan and intermediary and institutional businesses.
- Be aware of growth and product trends and changes in market needs and to address new opportunities with appropriate product solutions.
- Develop a strategic framework for managing product ranges that balance the Taiwan business growth and the risk taken.

Product Management

- Conduct a periodic review of the product range to determine whether it is optimal, and make recommendations for repurposing, closures, mergers or rationalization.
- Lead internal discussions on product changes or modifications and facilitate with the investment team as needed as well as across regional and global stakeholders as necessary.
- Function as an internal gatekeeper for investment capacity.
- Manage changes to existing funds, including, creation of new share classes, changes of investment objectives or benchmarks.

Product Delivery & Execution

- offshore fund registration and corporate actions including, product due diligence analysis, launching new share classes, pre-registration and regular KYP review, co-work with Legal for filing/ prospectus, co-work with APAC PD on corporate actions.
- Periodically review product Risk/ Return ratings for onshore/ offshore funds per local regulation.
- Onshore fund launch implementation, 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.

Purpose of your role

This position is responsible for product/ industry research analysis, support in administration assignments and data mining for Product Development and Management. This position will support fund related administrative reports, market/ product research and product material production, etc. Furthermore, to ensure that all the materials and info are delivered with good quality and on time.

Key Responsibilities

- Data analysis - market data mining and analyzing from various source including SITCA, TDCC, Lipper and Morningstar, etc.
- BAU/ Non-BAU administrations including but not limited to document translation and proofreading, product documentation preparation, SITCA questionnaire responses, and quarterly offshore fund KYP form population.
- Coordinate, attend meetings and take minutes when necessary.
- Conduct Taiwan AM industry analyses on a regular basis based on Keystone/ SITCA/ Morningstar database:
 - Onshore/ Offshore Fund Launch/ Registration Pipeline Report - monthly
 - Discretionary Investment ILP Market Overview - monthly
 - Onshore Fund Market Overview - monthly
 - Offshore Fund Market Overview - monthly
 - TW Product x Business Meeting Presentation Deck - monthly
 - Taiwan Asset Management Industry Report - quarterly
 - Fund Comparative Analysis - ad hoc
- Support the APPD team to build standard procedures for relevant product initiatives.

Experience and Qualifications Required

- Senior grade with a financial major.
- Fluent in business English and basic presentation skills.
- Having an excellent command of both oral and written communications, and a passion to share viewpoints.
- Proficient in MS Office Suite.
- Strong logical reasoning, well organized, efficient and keen attention to details.
- Capable of managing multiple complicated tasks and responsibilities at the same time.
- Strong work ethics/ Principles.

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- A team player with absolute honesty and integrity.
- Able to show flexibility and adaptability.
- Teachable and willing to accept challenges.
- Proactive and action-oriented.
- Knowledge or experience in the mutual fund industry is a plus.
- Fluent in Bloomberg, Morningstar/ Lipper and Zoom/ MS Teams is a plus.

Department Description (Wholesale) *2

With 20 professionals, the Intermediary Business is responsible for marketing Fidelity's retail products to intermediaries and wholesalers in Taiwan. The target clients are typically banks, insurance companies, brokerages and other financial intermediaries.

The intermediary business is expected to contribute to the continuous growth of Fidelity Taiwan's profitability by:

- Ensuring Fidelity's retail products and services are effectively marketed through the wholesale channel;
- Achieving annual gross and net sales target; and
- Increasing Fidelity's Taiwan retail mutual fund market by identifying sales opportunities and capturing some of its competitor's market share.

Purpose of your role

To develop an in-depth understanding about the Fidelity wholesale or intermediary sales business and the Taiwan asset management business by participating in intermediary sales as well as sales support activities. We service 4 groups of intermediary clients: banks, insurance companies, securities firms and e-platforms and the products we market include onshore and offshore funds and mandates that invest in equities, fixed income and multi asset portfolios.

Key Responsibilities

Sales

- Work with the sales managers (also called account officers) to sell to and service our intermediary clients
- Assist in preparing for sales pitches to both head offices and branches
- Assist in preparing for sales activities e.g. seminars
- Assist sales managers in preparing sales materials e.g. presentations

Sales Support

- Work with the sales support managers (also called account assistants) to service our intermediary clients and manage internal stakeholders (within and outside of Taiwan)
- Assist in responding to client queries
- Perform sales related documentation tasks
- Assist with product-related matters including corporate actions, regulatory requirements etc
- Assist with marketing-related matters including running client events, prepare gifts
- Prepare reports e.g. sales reports, client reports, fund reports etc
- Perform admin and operational tasks e.g. data collection and configuration from Lipper/Morningstar/Bloomberg, logistics, housekeeping

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.

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- Well organized, efficient, reliable, and capable of managing multiple complicated tasks and responsibilities at the same time.
- PC proficient (MS Office).

How to apply:

Please submit your CV and cover letter through this direct [link](#) or earlycareersatfidelity.com by **Tuesday, 12 May 2020**. Within your cover letter, please state your reasons for applying to Fidelity International, our Taiwan Internship Programme and your preference of the department(s) you are interested in.

Our application system opens on Friday, 1 May 2020 and we will be accepting applications until Tuesday, 12 May 2020 (11:59pm Taiwan time).

*Please note that we are unable to accept individual CVs sent via email, and all candidates interested in our summer internship have to apply online via our official application system.

If you have any questions, you can email us at earlycareersatfidelity@fil.com.

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