



WHATEVER YOU'RE STUDYING, COME AND LEARN MORE

Fidelity is a global Asset Management company that helps people to achieve their financial goals. We're looking for intelligent and curious minded individuals to help us change more lives.

We are passionate about providing a range of opportunities that help bright young individuals embark on exciting new career paths with us. We offer both commercial and investment schemes, so whether you want to help us make investments or you want to create the infrastructure that enables them, you'll be creating value at Fidelity.

You don't need a background in finance to join us, you'll have real responsibility from your first day regardless of your discipline.

Fidelity Taiwan

2018 - 2019 Internship Programme

Develop your skill set by applying to one of our internships, where you will gain experience and a taste for the industry.

How to Apply

Please refer to the Department Job Description, and submit your CV to recruitment@fil.com by Sunday, 1 April 2018.

Visit earlycareersatfidelity.com for further details.





Job Description

Title: Intern

Department: Institutional, PI, Wholesale, Marketing, Product Development, Technology

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 (Institutional) *1

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

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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 (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, 1 in Taichung, 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 (Wholesale) *1

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

The position includes internal tasks to achieve. Externally, assist WS Sales and Administration Assistants 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. In addition, Support sales to coordinate marketing materials to satisfy clients' requirements.

Key Responsibilities

1. Handle routine requests from distributors.
2. Help sales team to administrate sales related documentation works.
3. Cross department coordination to facilitate business development.
4. Assist Sales event related processes.
5. Inventory management

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6. 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)

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.

Key Responsibilities

- 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 quarterly tactical product material production
- 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.

Experience and Qualifications Required

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

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 Institutional 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 balances the Taiwan business growth and the risk been taken.

Product Management

- Conduct a periodic review of the product range to determine whether it is optimal, and make recommendations for repurpose, 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 internal gate keeper 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

The position is responsible in product/industry research analysis, support on administration assignment and data mining for Product Development and Management. This position will support fund related 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

- Market intelligence reporting and competitor fund analysis support
- Data mining & analysing – SITCA, Lipper and/or MorningStar, to co-work with APAC PD team (with a focus on market insights)
- Taiwan new onshore fund launch project support - product term sheet, prospectus, trust deed documents etc (including translation if necessary)
- SICAV new offshore fund registration data and analysis
- BAU/Non BAU administrations including but not limited to translation and checking, data form fill-in.
- Attend product discussion meetings and take minutes when necessary

Experience and Qualifications Required

1. Senior grade with financial major
2. Fluent in MS Office, Bloomberg, MorningStar and/or Lipper a plus.
3. Fluent business English and basic presentation skills
4. Strong logical reasoning, well organized, efficient and reliable
5. Capable of managing multiple complicated tasks and responsibilities at the same time
6. Basic knowledge about mutual fund industry is a plus.
7. Strong work ethics/Principles
8. Communication skills
9. Honesty & Integrity
10. Team player
11. Flexibility & Adaptability

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12. Proactive & Action-oriented
13. Has good command of oral communication, and has passion to share viewpoints

Department Description (Asia Pacific Technology) *1

The Technology function provides IT services to the Fidelity International business, globally. These include the development and support of business applications that underpin our revenue, operational, investment, compliance, finance, legal, marketing and customer service functions. The broader organisation incorporates Infrastructure services that the firm relies on to operate on a day to day basis including data centre, networks, proximity services, security, voice, incident management and remediation.

Purpose of your role

The individual will primarily assist for business process automation with Technology and rotation between different Technology role to experience and assist the technology roll out or business support.

Key Responsibilities

- Assist for business process automation with Technology
- Local End User support assistance and some short-term support/coordination
- Support applications testing and complete testing report

Experience and Qualifications Required

Essential skills

- Dynamic and flexible attitude with an ability to adapt to new requirements
- Awareness of the impact of change to the business environment, and to support teams
- Ability to communicate technical issues in non-technical terms to business people
- Good problem solving skills
- Good documentation and presentation skills
- Good skills of spoken and written English and communication skills.
- Good collaboration skill sets and customer focus attitude
- Programming or scripting experience (EX: Powershell / Ruby / Python / VBScriptetc)

Desirable skills (Optional)

- Support or Lead the University Technology project experience
- Japanese speaking is a plus