



# Position Description

Position Title: Product Specialist – Institutional Accounts	Type of Position: Full-Time Regular
Department: Investor Services	Reports to: Director, Investor Services
Date: 4/10/17	FLSA Status: Exempt

## Position Overview

The Product Specialist, Institutional Accounts is an outward facing client service role involving managing high level U.S. and International institutional client relationships. The position requires in-depth knowledge of financial markets, investment management and financial analysis concepts, terms and definitions including risk measurements.

## Job Functions

- Organize and conduct conference calls and portfolio reviews, with the ability to discuss strategy, performance, risk measures, attribution, opportunities, market sectors and comparisons
- Give presentations, which would include client reviews and cross selling other DoubleLine strategies and Funds
- Coordinate with Investment teams, Legal and Compliance, Product Solutions and Communications teams to prepare materials, coordinate schedules, etc. for due diligence, reporting and client review meetings
- Responsible for client reporting, ad-hoc requests and general account maintenance
- Upload customized reports into clients' systems, as well as oversee internal reporting requirements to ensure they are fulfilled in a timely manner
- Work closely with Client Onboarding to coordinate reporting and relationship-building.
- Maintain ongoing communication with Global Relationship Manager regarding mutual clients
- Develop a deep understanding of assigned client portfolios and DoubleLine offerings

## Qualifications

- Bachelor's Degree required, MBA or CFA preferred
- 7 – 10 years of experience working with U.S.-domiciled entities and international clients. International client service experience preferred
- Ability to present on a high level to CEOs, Board of Directors, investment committees and consultants.
- Fluency in Japanese, Mandarin, Korean or any Romance language preferred
- Well versed in fixed income strategies, equities and macro-asset allocation strategies
- Good attitude, strong work ethic, good communication skills

NOTE: The above statements are intended to describe the general nature and level of work being performed. They are not to be construed as an exhaustive list of all responsibilities, duties and skills required. All employees may be required to perform duties outside of their normal responsibilities from time to time, as needed, to meet the ongoing needs of the organization.

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