

## Job Description - Taiwan Internship Programme 2021

**Title:** Intern (12 months part-time)

**Department:** Institutional Sales (2), Wholesale Sales (3), Customer Excellence (1) Investment Management (2), Marketing (2)

**Location:** Taipei, Taiwan

**Reports To:** Line Manager which are the heads of Institutional Sales, Wholesale Sales, Customer Excellence, Investment Management, Marketing teams

### About Fidelity International

Fidelity International offers investment solutions and services and retirement expertise to more than 2.5 million customers globally. As a privately-held, purpose-driven company with a 50-year heritage, we think generationally and invest for the long term. Operating in more than 25 locations and with \$706.3billion in total assets, our clients range from central banks, sovereign wealth funds, large corporates, financial institutions, insurers and wealth managers, to private individuals.

Our Workplace & Personal Financial Health business provides individuals, advisers and employers with access to world-class investment choices, third-party solutions, administration services and pension guidance. Together with our Investment Solutions & Services business, we invest \$541.6 billion on behalf of our clients. By combining our asset management expertise with our solutions for workplace and personal investing, we work together to build better financial futures. Find out more about what we do, our history, and how you could be a part of our future at [careers.fidelityinternational.com/about-us](https://careers.fidelityinternational.com/about-us).

We are a disability-friendly employer and committed to ensuring equal opportunities for all employees and job applicants. If you might benefit from reasonable adjustments to perform to the best of your ability at any stage of our recruitment and selection process, please get in touch with us for a conversation about your requirements.

Our clients come from all walks of life and so do we. We foster inclusiveness and encourage applications from any and every age, race, ethnicity, disability, gender identity, religion, culture, sexual orientation, or caring responsibility. Please don't hesitate to contact us once you have applied to discuss the support we could offer you to help make Fidelity International even stronger.

### 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 Sales, Wholesale Sales, Customer Excellence, Investment Management, Marketing teams**

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### Department Description (Institutional) \*2

Institutional sales team provides mutual fund and mandate investment service to local institutional clients, including government entities, insurance companies, asset managers, other financial institutions and non-financial corporates. The team was established in 2002. Our focus is on being client-obsessed by providing high quality service and best in class investment solutions.

### Purpose of your role

The Institutional Sales intern will be primarily responsible for working closely with the team to achieve the department's goals which are to provide high quality service and best in class investment solutions to our institutional clients.

### Key Responsibilities

- Provide market research and timely market update from leading financial press.
- Conduct summary of conference calls.
- Perform quantitative and qualitative fund analysis.
- Provide support for mandate services.
- Provide administrative support.

### Experience and Qualifications Required

- Senior grade with financial major.
- Strong and effective communication skills in English and Chinese (written and spoken).
- Strong willingness to learn.
- Comfortable with the Fidelity corporate culture of results-orientation, teamwork, professionalism, quality, thoroughness, process, risk management, and global presence.
- Dynamic, positive, proactive and perseverant work attitude.
- Be able to operate effectively and efficiently under stress and deliver assigned tasks within a stated timeline.
- Demonstrate curiosity, outside the box thinking and ability to improve status quo.
- Strong interpersonal skills and high EQ demonstrated by ability to effectively navigate and build relationships with colleagues.
- Good problem-solving skills.
- Focus on personal excellence, attention to detail and high level of accuracy and well-organised.
- High standard of ethics, honesty and integrity.
- PC proficient (MS Office).

### 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

The Investment Management intern will be primarily responsible for working closely with the team to perform the following duties:

- 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

- Senior grade with financial major.
- Strong and effective communication skills in English and Chinese (written and spoken).

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- Strong willingness to learn.
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- High standard of ethics, honesty and integrity.
- PC proficient (MS Office).

#### Department Description (Marketing) \*2

The Taiwan marketing team is responsible for the following functions:

- Content production and delivery
- 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;
- Developing and implementing the marketing strategy and activities for all 3 business channels (Wholesale, Institutional and Personal Investing), working in close partnership with the local sales and regional marketing teams to develop and implement key initiatives that include above and below the line marketing activities; and
- Collaborating with the Head of Product Marketing team to develop effective and powerful marketing content strategy, aligned with business & product/solution proposition, to deliver world-class marketing communication plan in both traditional and digital channels/platforms for Taiwan business; and
- Managing the marketing budget to reflect aligned business goals with clear tracking, measurement and ROI

#### Key Responsibilities

The Marketing intern will be primarily responsible for working closely with the sales, customer excellence and marketing teams to perform the following duties:

- Support content production and delivery including presentations, DMs as well as adhoc and regular market documents.
- Perform quantitative and qualitative fund analysis.
- Perform translation from English to Chinese of content developed by global investment teams.
- Support marketing campaign-related activities and events
- Support financial control related processes including payment and vendor processing and budget planning
- Support marketing related admin process including fulfilling regulatory requirements

#### Experience and Qualifications Required

- Senior grade with financial major.
- Strong and effective communication skills in English and Chinese (written and spoken).
- Strong willingness to learn.
- Comfortable with the Fidelity corporate culture of results-orientation, teamwork, professionalism, quality, thoroughness, process, risk management, and global presence.
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#### Department Description (Customer Excellence) \*1

The Customer Excellence team is an integral function within the Taiwan Distribution function. The team comprises 10 experienced professionals that provide sales, marketing and call centre support to a team of more than 30 high performing sales and marketing professionals. The team is also responsible for providing first class servicing and excellent client experience to internal and external stakeholders, as well as contribute to the strong growth ambitions of Fidelity Taiwan.

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### Purpose of your role

The Customer Excellence intern will be primarily responsible for working closely with the sales, marketing and call centre teams, their internal stakeholders and external partners to deliver first class servicing and excellent client experience.

### Key Responsibilities

- Assist to service our internal and external clients.
- Assist in responding to queries.
- Perform sales and marketing-related documentation tasks.
- Assist with product-related matters including corporate actions, regulatory requirements etc.
- Prepare regular and adhoc 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.
- Strong and effective communication skills in English and Chinese (written and spoken).
- Strong willingness to learn.
- Comfortable with the Fidelity corporate culture of results-orientation, teamwork, professionalism, quality, thoroughness, process, risk management, and global presence.
- Dynamic, positive, proactive and perseverant work attitude.
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### Department Description (Wholesale) \*3

The Wholesale Sales team is a key revenue generating distribution function of Fidelity Taiwan. The team comprises 26 sales and professionals and is responsible for partnering with intermediary clients in Taiwan to provide them with investment solutions that meet their needs as well as providing first class servicing. Our clients include local and international banks, insurance companies, securities firms and online platforms. The team is also responsible for developing and executing a sound and effective sales strategy that will help Fidelity International meet its ambitious business growth targets as well as increase the brand recognition and market share of Fidelity Taiwan.

### 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, branch visits.
- Assist sales managers in preparing sales materials e.g. presentations, writeups.

### Experience and Qualifications Required

- Senior grade with financial major.
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#### How to apply:

Please submit your CV and cover letter through this [link](#) or [careers.fidelityinternational.com](https://careers.fidelityinternational.com) by **Sunday, 9 May 2021**. 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, 16 April 2021 and we will be accepting applications until Sunday, 9 May 2021 (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](mailto:earlycareersatfidelity@fil.com).

***We are committed to being an inclusive and diverse company to work for and strive to create a culture where flexible working is encouraged so that we retain and attract the best talent by offering working patterns that suit both individual and business needs.***

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