

Investment Platform > Provision of Investment Products

Title	Provide investment services in foreign exchange
Code	106821L5
Range	Providing investment service on FX products which covers the product structure and delivery platform.
Level	5
Credit	4 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Evaluate the requirements for service delivery <p>Be able to:</p> <ul style="list-style-type: none"> • Demonstrate professional knowledge in FX products in order to understand the requirements on delivery • Demonstrate professional knowledge in investment in order to provide advice on product structure 2. Manage investment platform <p>Be able to:</p> <ul style="list-style-type: none"> • Design the processes and documentation requirements in-line with bank policies and regulations for FX products and develop tools to assist implementation • Develop and maintain service standards for different transactions • Identify and maintain channels for purchase or sale of FX products 3. Coordinate with relationship managers to customize the products <p>Be able to:</p> <ul style="list-style-type: none"> • Evaluate the investment objectives and other information of clients in order to assess the unique investment needs • Coordinate with relationship managers to develop customized solutions in order to satisfy the unique needs of individual clients • Coordinate with relationship managers to present the customized solutions to clients and make disclosures concerning the product structures, product feature, risk, fees and terms, etc. • Develop service agreements and obtain acceptance from clients
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Delivery of investment services in a smooth manner and is able to fulfill the needs of clients.
Remark	