

Product Specialist

New York Life Investment Management – MainStay Investments

Product Management Department

We currently have a position open for a Product Specialist primarily responsible for supporting the MainStay mutual fund and separately managed account (SMA) businesses. With an increasing presence on key platforms, MainStay Investments is a dynamic, growing organization recognized for its multi-boutique investment management and proven wealth building tools, and we proudly stand on a track record of accountability, integrity, and commitment.

Job Description

Product Specialists serve as an in-field advocate for our investment strategies across multiple distribution channels. Responsibilities which include, but are not limited to:

- Providing national in-the-field support of our Wholesale Sales Force, including branch meetings, advisor walk-throughs, and client events.
- Supporting the Relationship Management teams at analyst meetings and information/training sessions for Key Account sales desks and support teams.
- Working closely with the Investment Management teams to understand portfolio positioning and factors driving product performance.
- Clearly articulating investment style/process, portfolio strategy and recent performance to both internal and external audiences.
- Researching and communicating market or economic developments.
- Positioning and differentiating the product line relative to leading peers.
- Responding to inquiries from external and internal wholesalers, as well as business partners across the organization
- Working closely with the Marketing team to develop new product support materials and sales ideas
- Ensuring that the investment stories for assigned products are presented consistently.
- Conduct and participate in ongoing product training for the Sales team regarding key strategies and new products

Qualifications / Requirements

- Minimum of 8-10 years of investment-related experience. Prior Product Management, Sales, Economic, SMA, Investment Management or Research experience preferred.
- MBA, CFA, or CIMA with appropriate business experience required.
- Strong investment industry knowledge.
- Strong communication, presentation, written and analytical skills required.
- Willing to travel the U.S. extensively.
- Ability to work collaboratively to achieve team objectives.
- Ability to handle multiple projects simultaneously and complete projects on a timely basis.
- PC skills, including PowerPoint, Excel and Word recommended.
- Knowledge of industry tools, such as Bloomberg, Ned Davis, Lipper, Principia, etc. a plus.

About us: New York Life Investment Management (NYLIM), a top institutional money manager that has over \$249 billion¹ in assets under management and is ranked among the top 25 investment managers in the world.² MainStay Investments is the advisor-distribution arm of NYLIM.

1. AUM as of December 31, 2007, with affiliates

2. New York Life Investment Management LLC is ranked number 25 in worldwide assets under management. Source: Pension & Investment, May 28, 2007.