

PERFORMANCE
CONSULTANT SA

Conseil en ressources humaines

RM Assitant - Latam markets H/F

Our client:

An international private bank based in Geneva.

Role & Responsibilities:

- Commercial support to RM :
 - Identification and follow up of commercial opportunities and prospects
 - Preparation as well as participation of client meetings together with the RM
 - Identification of client information for commercial purpose
 - Preparation of tailor-made presentations and proposals
 - Approval of trades within the delegation level
 - Preparation of credit files and renewal of complex credit files
 - Treatment of OST (securities transactions)
 - Follow up of financial markets and participation to internal information meetings to follow the commercial campaigns
 - Periodic control (or on demand) of client portfolios (profitability, CIP checks, diversification,)
 - Prepare recommendations reflecting the campaigns and strategies of our Advisory Desk, always in line with the client profile
 - Offer subscriptions for new products and services (guaranteed capital, FCP, ...) to clients in collaboration with the RM
 - Being sensibilised to cross-border rules
- Contact and customer service :
 - Frequent contacts with clients
 - Advise the client on the securities settlement (OPA/OPE/split, etc.)
 - Participation to client visits in the Bank's premises
 - Follow up of the daily information published by the Advisory Desk (FX comments, stock exchange, products, ...)
 - Participate at different business meetings within the business lines, Advisory Desk, commercial trainings
 - Develop his/her own network and present business opportunities to the Bank
- Administrative assistance to the RM
 - Management of the administration of sophisticated client relations by interaction with the different departments
 - Contribute to the KYC review, in particular press monitoring
 - Validation of incoming transfers at the level of his/her delegation
 - Pricing : follow up of pricing conditions, counterparts and invoicing
 - In charge of onboarding files
 - Follow up of CIP and suitability
- Ensuring the control of risks :
 - Respect and implement the current rules and procedures of the Bank
 - Identify the inherent risks concerning his/her activity (compliance, administration and loans)
 - Respect the cross-border rules
 - Respect the Code of Conduct

Profile:

- Graduated from University in Banking/Economics/Finance with a Master degree or equivalent
- At 7 years experience as RM assistant or Associate Banker with experience in wealth management industry
- Strong interest in the area of the client management and driven by commercial conquest
- Fluent in Portuguese, English and French. Knowledge of Spanish is a plus.

Contract type: Permanent

Rate of activity: 100%

Starting date: ASAP

We guarantee you to handle your application in total confidentiality

Consultant responsable du mandat : Mouhssine Moudrik
Ref : MM968138725