

# **PERFORMANCE CONSULTANT SA**

Conseil en ressources humaines

## **Assistant Private Banker MENA H/F**

### **Our client:**

An international private bank based in Geneva

### **Role & Responsibilities:**

- Assist Private Bankers with all client related matter, namely:
- Performing periodic sweep of clients' account to identify and need for rebalancing investments, investing and reporting to the Private Banker.
- Ensuring the Private Banker is up-to-date on all important client related matters.
- Preparing, submitting and following up on all types of Credit Requests
- Liaising with Private Banking operations to follow up on requests (Credit Cards, Transfers, Deposits, account opening, etc).
- Replacing the Private Banker in all his functions during his absence from the office.
- Preparing all documentation/presentation prior to a Private Banker's client meeting.
- Assist Private Bankers, when requested with managing on day-to-day basis, portfolios of existing and potential clients to meet assigned financial targets, cross-selling other units (Treasury, Investments etc) within the client needs, making weekly client visits and preparing the related call reports.

### **Profile:**

- University graduate with **at least 5 years' experience in financial** services with a specialization in managing accounts/ relationships with UHNW customers
- **Good understanding of the Private Banking (UHNW) customer base**, its needs and expectations.
- Sufficient experience in CH with a great acumen in CH regulations
- Mastering well in KYC process
- **AVALOQ user** will be a strong asset
- **English & Arabic fluent**

**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 : MM1684320620