PERFORMANCE
CONSULTANT SA
Conseil en ressources humaines

Investment Manager - EU Market

Our client:

An international private bank based in Geneva

Role & Responsibilities:

• Advises WM clients with an advisory agreement on all investment-related matters. Clients are part of the European market (potentially the Latam market as well) - with a focus on Spanish clients (covered in English or French). In addition to French and English, Spanish and / or Portuguese are nice to have.
• Knows investment strategy, suitability and products; knows and follows the Bank's values, processes and procedures - especially those related to advisory accounts and investment products. Regularly updates his / her knowledge on the matter.
• Knows clients within his / her book (investment objectives and constraints / personal investment rules, risk tolerance) and their investment portfolios (financial instruments, risks, investment opportunities).
• Regularly interacts with clients - analysing their investment portfolios, providing support and explanation, proactively providing investment ideas, in line with the bank's recommendations and the portfolio's characteristics (including investment suitability and risks); regularly performs portfolio reviews and asks clients for feedbacks.
• Executes instructions related to investment decisions made by clients. Quick and efficiently solves issues, notably market-related trade issues, if any.
• Support RMs in winning new clients for the bank by providing capital market expertise and investment proposals.
• Actively promote all investment-related services to eligible advisory clients, including discretionary portfolio mandates, sustainable advisory, Lombard credit offering and digital advisory tools, when applicable.
• To sum up, works in an autonomous but also coordinated manner with relevant colleagues and departments - notably RMs, other IMs and product specialists - to generate client satisfaction with regards to advisory services - focusing on client contact intensity and portfolio performance, while meeting all his / her objectives (KPIs), with a focus on revenue generation and suitability to our processes and values.

Profile:

• Master Degree or equivalent (> 4 years)
• At least 5 years experience in a similar role within investment counseilling
• Strong expertise in Financial Management & Asset Allocation
• Ability to conduct a negotiation (Expert)

Required skills:

• Ability to Deliver/Results Driven
• Ability to collaborate/Teamwork
• Resilience

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 : MM1213472848