

PERFORMANCE CONSULTANT SA

Conseil en ressources humaines

Assistant Relationship Manager

Our client:

An international finance company which is growing the Wealth management department.

Role & Responsibilities:

- Assist Relationship Managers in managing and growing the client portfolio by providing high-quality service and support to clients.
- Serve as a point of contact for clients and ensure all inquiries and requests are handled in a timely and professional manner.
- Assist with account opening, documentation, and client onboarding processes.
- Prepare client reports, presentations, and financial analysis as needed.
- Conduct market research and analysis to support the development of investment strategies and client portfolios.
- Collaborate with other departments, including Compliance, Operations, and Investment Advisory, to ensure a seamless client experience.
- Maintain accurate and up-to-date client information in our systems and databases.

Profile:

- Minimum of 2-3 years of experience in private banking, wealth management, or a related industry.
- Commercial Banking apprenticeship or bachelor's degree in Finance, Economics, or a related field.
- Strong understanding of financial products and services, including investment products, credit facilities, and wealth planning solutions.
- Excellent communication skills, both verbal and written, in English and French (German and Italian are a plus).
- Strong organizational skills and attention to detail.
- Ability to work well under pressure and in a fast-paced environment.
- Proficient in Microsoft Office and other financial software programs.
- Knowledge of Swiss banking regulations and industry standards is preferred.

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 : MM1373745282