

Junior Relationship Manager

GENEVA

Our Private Banking division focuses on providing services and advice to a sophisticated clientele of individuals, entrepreneurs, managers and family offices in Switzerland, Europe and emerging markets. Through its various services units it offers expertise in wealth management, financial intermediation, personalized financial advice. Combining the experience of an independent Swiss private bank with the innovative strength of a national asset manager the Private Banking division supports its clients objectively by virtue of in particular an open platform and the in-depth knowledge of its expert managers. Attributes that allow it to take fully into account the specific needs of its customers in the face of market conditions.

To strengthen the team in Geneva and sustain our organic growth strategy, we are seeking a dynamic, entrepreneurial, and experienced Junior Relationship Manager.

What you will do

- In close collaboration with a Senior Relationship Manager, maintain an existing client book while analysing the clients requirements and needs
- Develop your own network for client acquisition
- Meet prospects and clients, prepare client meetings and manage follow-up actions
- Understand our product offering and develop ability to introduce also complex solutions to clients.
- Develop your own value proposition in accordance to the banks strategy as a holistic advisor
- Provide to the client with investment and management advice/proposals, aligned with the client's goals, assets and chosen investment.
- Maintain close collaboration with specialists to keep up-to-date with investment solutions and developments in the financial industry
- Keep accurate and up-to-date client investment profiles using internal tools
- Execute transactions, payments and other banking operations
- Open new accounts and follow-up on administrative matters
- Perform administrative tasks related to client files and provide administrative, organizational and communication support to the Senior Relationship Manager in his daily tasks.

What we are looking for

- 3 to 5 years of private banking experience as Junior Relationship Manager, Senior Assistant or Investment Advisor
- Degree in finance, economics or similar qualification with ideally a post-graduate qualification such as CFA or CWMA
- Independent, agile, enthusiastic, initiative and service-oriented
- Interpersonal, negotiation and influencing skills
- A high degree of personal integrity, entrepreneurial, challenge statu quo, innovative
- Excellent knowledge of English and French, Spanish and/or Portuguese are strong assets
- Valid working permit

How do we keep you smiling

- The responsibility of an instrumental role at the heart of the development of a human-scale bank, with little hierarchy and recognised know-how and expertise
- A large autonomy of personal operation allowing a real capacity for proposal and initiative
- An interesting role due to its challenges, complexity and variety
- A remuneration adapted to the experience, skills and seniority of the successful professional

About Banque Heritage

Banque Heritage is a Swiss private banking group that provides a wide range of financial services and tailored investment products. While global in scope and innovative in its solutions, the Bank holds true to its core values – family-orientated approach, independent perspective, intelligent financial management and dedication to our clients and commitment to our people. Founded in 1986, the Bank is headquartered in Geneva with an international presence.

We are looking for professionals with all types of skills, interests and experiences. We care about bringing together staff who are client-oriented, entrepreneurial minded, enthusiastic, collaborative and have the drive to make things happen for our clients and communities.

APPLY NOW

Please send your applications to hr@heritage.ch.
Only direct application will be considered.

We believe that in order to recruit the best professionals all applications must be reviewed equally. For this reason, all the elements you wish to share with us in your file are not discriminating (photo, age, gender, location, for example). We are committed to offering equal opportunities.

If your application is selected, we will reach out for an introductory call.
As part of the interview process, we always ensure complete insight and transparency, namely, you will have the chance to meet people who will be crucial to your future success in the role.

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