

# Senior Portfolio Manager

GENEVA

Our Investment Services division provides investment recommendations by generating fundamental research and analysis of economies, markets, industries and companies. Our team helps our clients and relationship managers achieve superior returns by seeking to develop creative, differentiated investment insights. With services ranging from macro & strategy research, direct investment advisory, multi assets-products to discretionary management, our team develops tools and ideas to help shape investment strategies for clients and relationship managers.

To strengthen the discretionary portfolio management team, we are seeking a dynamic and experienced, Geneva-based Senior Portfolio Manager.

## What you will do

### Portfolio management

- Ensure timely, efficient, and accurate implementation of the Banks investment decisions in discretionary accounts while following internal rules, regulatory constraints, and clients' restrictions
- Perform daily portfolio management tasks, including cash management and currency overlays.
- Ongoing monitoring of discretionary portfolios (risk budget, performance, asset allocation)
- Maintain and manage model portfolios including analysis of performance contribution (SSA & TAA)

### Communication with Relationship Managers & Clients

- Proactive support to promote DPM products and services towards Relationship Managers, clients and prospects
- Present the Bank's investment strategy and the performance of managed accounts of assigned clients.
- Support Relationship Managers through preparation of portfolio reviews and presentations

### Contribution to the investment process

- Participate in regular investment meetings and work closely with other investment team members and analysts to discuss views on market events and analysis
- Contribute to the continuous development of our investment offering including the ongoing development of the portfolio construction and risk management framework.

## What we are looking for

- 10 years of related experience the management of multi-assets portfolios and asset allocation in a similar institution
- Master's degree in Economics/Finance, or recognized diploma in investment (CFA /CIA an asset)
- Excellent knowledge of asset allocation and portfolio management
- Demonstrated customer presentation and communication skills with an excellent client servicing background
- Independent, agile, enthusiastic, and service-oriented with ability to take decisions
- Strong team player and willingness to collaborate across the organization

## 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
- An interesting role due to its challenges, complexity and variety
- The support of a competent and motivated team
- A large autonomy of personal operation allowing a real capacity for proposal and initiative
- 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.

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### APPLY NOW

Please send your applications to [hr@heritage.ch](mailto: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.

### GENEVA

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