

Assistant **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, we are seeking a dynamic and experienced, Assistant Relationship Manager who will provide administrative and operational support to Relationship Managers.

What you will do

- Support Relationship Managers in all daily and relevant tasks related to client portfolios
- Manage client accounts and transactions (foreign exchange, securities, credits, etc.)
- Deal with the computing, administrative and legal aspects of opening and closing client accounts
- Support the relationship managers in KYC, compliance and regulatory requirements related matters
- Prepare clients meetings and manage client instructions in the absence of the relationship managers
- Plan and assist the relationship managers in their travel arrangement
- Provide general administrative support (telephone, documents, correspondence, mailing of brochures and marketing information)
- Support the team with client-related projects as and when required

What we are looking for

- Minimum 5 years of experience in a comparable position
- Education background in economics
- Fluent in English and French
- Knowledge of financial products and markets
- Customer oriented mindset
- Excellent administrative and organizational skills
- Reliable team player with strong sense of responsibility
- Good communication and interpersonal skills
- IT literate, familiar with Microsoft environment and Private Banking systems (knowledge of S2i being a plus)
- Swiss resident, valid permit

How do we keep you smiling

- The responsibility of an important 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
- The support of a competent and motivated team
- 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.

GENEVA

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