



Assistant **Relationship Manager**

External Asset Managers Desk

ZURICH

Our Private Banking division focuses on providing services and advice to a sophisticated clientele of individuals, entrepreneurs, managers, External Asset 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. Private banking services can be offered through an External Asset Manager (EAM) model. A dedicated and experienced team provides the tools, products and services that allow to serve the best possible offer for professional partners. An increasing number of independent asset managers value our personalised, flexible services and our transparent fee structure.

To strengthen the External Asset Managers team in Zurich and sustain our organic growth strategy, we are seeking a dynamic, and experienced Assistant Relationship Manager EAM.

What you will do

- Proactive and efficient support of 3 dedicated Relationship Managers in all their activities
- Handling of day-to-day business including independent client interaction (pending management, correspondence, account opening, compliance, etc.)
- Efficient order taking and processing in the areas of securities, foreign exchange, securities and payment transactions
- Support in the preparation and follow-up of client and acquisition meetings incl. organizing business trips, agenda management, presentations, correspondence
- Support the relationship managers in KYC, compliance and regulatory requirements related matters
- Deal with the computing, administrative and legal aspects of opening and closing client accounts
- 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

- Completed banking or commercial training with minimum 5 years of private banking or EAM experience. Higher education in banking or business administration is an advantage
- Knowledge of regulatory framework in international EAM or private banking business (cross-border rules, MiFID, AML etc.)
- Committed and thinking personality with a very high level of initiative
- Strong customer orientation and willingness to serve with the highest standards of quality and reliability
- Reliable team player with strong sense of responsibility and very good communication skills
- Excellent administrative and organizational skills
- IT literate, familiar with Microsoft environment and Private Banking systems
- Fluent in English and German
- 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.

ZURICH

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