

Senior Relationship Manager

GENEVA
ZURICH
BASEL
SION

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 and sustain our organic growth strategy, we are seeking dynamic, entrepreneurial, and experienced Senior Relationship Manager(s).

What you will do

- Develop, build and maintain relationships with high-net-worth clients, understanding their financial objectives, and providing advice on wealth management solutions
- Identify opportunities to deepen existing client relationships and expand the client base, driving revenue growth through new business development.
- Develop your own network for client acquisition and meet prospects and clients, prepare client meetings and manage follow-up actions
- Deliver exceptional service to clients, responding promptly to inquiries and proactively addressing their needs
- Analyze portfolio positions, prepare performance evaluations and investment proposals aligned with clients' objectives, assets and investment strategies
- Ensure knowledge of and adherence to compliance and cross-border rules to ensure compliance with local laws, regulatory requirements and internal guidelines
- Understand economic and monetary developments on the performance of markets, companies and sectors. Stay informed of events related to the various markets

What we are looking for

- 10 years of private banking experience as Relationship Manager
- Degree in finance, economics or similar qualification with ideally a post-graduate qualification such as CFA. Valid certification as Client advisor is a must (CWMA)
- Previous business development experience in Private Banking, developing new client relationships
- Proven sales success including: prospecting, profiling, overcoming objections, negotiation, team selling approach, closing the sale and asking for referrals
- Experience or demonstrated understanding of investments, banking and trust concepts including, but not limited to: asset allocation on structured portfolios, managed portfolios, brokerage accounts, portfolio reviews
- 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 or German, any other languages are strong assets
- Valid working 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
- An entrepreneurial environment fostering pragmatic and quick decision-making process and 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.

GENEVA

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