

# Senior Relationship Manager

GENEVA  
ZURICH  
BASEL  
SION

Banque Heritage is a Swiss Private Bank offering a wide range of financial services and bespoke client solutions. While global in scope and personal in service, the Bank holds true to its core values – family-orientated approach, independent perspective and dedication to our clients while commitment to our people. Headquartered in Geneva, the bank is prominently represented in Zurich, Basel, and Sion, serving clients on an international scale.

As part of our growth strategy, we are seeking experienced and entrepreneurial **Senior Relationship Managers** to join our dedicated Private Banking team. Together, we'll strengthen collaborations with our clients and partners, upholding our tradition of excellence.

As a Senior Relationship Manager, your focus is the relationship with your clients, being the partner and advisor on their financial path, for the current and following generations. Leveraging your extensive experience in wealth management, you will provide tailored financial solutions, optimize portfolios, and offer expert guidance to clients, ensuring their financial objectives are met. This role is a unique opportunity to work with a dynamic Swiss private bank, providing you with access to an extensive network and resources to serve your clients effectively.

## 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 referral management
- 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 status 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

- Being part of client oriented Swiss Private Bank, which understands Wealth Management within all departments
- The responsibility of an important role at the heart of the development of a human-scale bank, with direct Senior Management exposure, flat hierarchy and recognized 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 competitive remuneration adapted to the experience, skills and seniority of the successful professional

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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](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.

When applying to this career opportunity, the candidate acknowledges and agrees that, in accordance with relevant legal regulations, Banque Heritage will collect and process his/her personal information for the purpose of contacting you and to analyse if your profile meet our criteria for the job. In the absence of a favourable response from us, we will keep your personal data for a limited period so that we can contact you again if we have new job offers. For additional details regarding the handling of personal data and the candidate's rights pertaining to this information, please refer to the Notice on Data Protection of Banque Heritage available at <https://www.heritage.ch/en/legal-disclosures>

## GENEVA

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