

Team Head Swiss Onshore Clients ZURICH

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 an experienced and entrepreneurial **Team Head Swiss Onshore Clients** to join our Private Banking team in Zurich, driving client acquisition and relationship management within the Swiss onshore market. In this role, you will be entrusted with the mission of building, leading and inspiring a high-performing team, developing and implementing strategic plans, contributing to the growth of the bank's client base within the Swiss onshore market. Reporting directly to the Head of Private Banking, you will contribute to the bank's overall success through strategic leadership, client-centric initiatives, and continuous development of the team and its capabilities.

What you will do

- Collaborate with the Head of Private Banking to devise and execute strategic initiatives for the Swiss onshore market, specifically in the German-speaking region.
- Spearhead business development efforts aimed at enlarging the bank's clientele. Leverage your extensive relationship managers experience in this market to acquire and manage a portfolio of high-net-worth clients.
- Build and inspire a team of private bankers, relationship managers, and support staff in Zurich.
- Foster a collaborative and high-performance culture within the team.
- Provide guidance, mentorship, and training to team members for professional development.
- Build and maintain strong, lasting relationships with clients, understanding their financial goals and providing tailored solutions.
- Contribute to the development of Swiss products, solutions, and offerings to meet client needs.
- Build and nurture a high-performing local team in Zurich.
- Recruit, train, and develop team members to enhance their skills and capabilities.
- Collaborate with other departments to ensure seamless service delivery and client satisfaction.
- Report and provide regular updates on team performance, client acquisition, and market trends.

What we are looking for

- 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).
- 10 years of relationship management experience in a management role in the Swiss onshore market within a private banking setting.
- Proven track record of successfully acquiring and managing high-net-worth clients in Switzerland.
- Extensive knowledge of Swiss products, solutions, and offerings.
- Previous business development experience in Private Banking, developing new client relationships.
- 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 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 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 competitive remuneration adapted to the experience, skills and seniority of the successful professional

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.

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>

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