



# Relationship Manager EAM

Experience level : **Intermediate**

Activity : **Group**

Office : **Zurich**

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## Purpose of the role:

Syz is a family business focused on private banking, alternative investments, asset management and services for Independent Managers. Entrepreneurs for centuries, the Syz Group was co-founded in 1996 by Eric Syz who still leads the firm alongside his two sons and a team of industry experts.

At Syz, we actively look for new talents to shape the future of our clients. For our long-term development in the segment of External Asset Managers, we are looking for a motivated and competent client advisor who would like to actively contribute to the success of a family-run, medium-sized Swiss bank. We will offer you the opportunity to contribute to the expansion of the External Asset Manager desk in Zurich, a strategically important segment for the bank and to take on responsibility for results and decision-making in a dynamic environment and to develop personally and professionally.

If you are obsessed with meeting client needs, want to challenge the status quo and be part of the future, then we want to hear from you. Working at Syz takes a blend of collaboration, entrepreneurial spirit and willingness to pull together. In return of your talent and dedication you can expect a fast-paced, stimulating work environment, a flat hierarchy with direct access to senior leaders, a culture hungry for innovation and feedback, and the opportunity for your voice to be heard and your ideas listened to.

## Key responsibilities

- Develop a book of EAM and onboard new EAM
- Dealing with demanding Independent Asset Managers and Multi Family Offices in German-speaking Switzerland (and potentially in the U.S.)
- Handling the day-to-day business with the support of competent assistants
- Providing the client with investment and management advice, in accordance with the Bank's investment strategy based on the client's investment objectives and profile (Advisory, Discretionary processes etc.) as well as manage the credit requests
- Actively cooperate and exchange with internal specialists
- Collaborating with our risk & compliance functions to ensure regulatory and legal requirements are fulfilled including KYC periodical reviews
- Ensuring that your level of knowledge relating to your markets is up to date (market watch - cross-border rules, geopolitical news, product knowledge etc.)

## Your profile

### Education:

- MBA, University degree or completed banking education with specialised further training
- CWMA a must

### Professional Experience required:

- Several years of experience in building up a client book in the intermediary business of a (private) bank in Switzerland
- Very good network in the EAM / MFO segment in German-speaking Switzerland, a focus on intermediaries with an SEC licence would be an

advantage

**Soft skills:**

- Initiative and service-oriented personality with proven acquisition skills
- Strong communication and representation skills with a cultivated appearance
- Committed and dedicated to maintaining the highest standards with respect to our risk and control culture and in order to meet bank's policies and obligations

**Technical skills:**

- Sound technical knowledge of banking platforms, securities trading, FX, derivatives and loans

**Languages:**

- Good command of written and spoken English and German, knowledge of French is an advantage

**Swiss Residence requirements? Yes**