



# Flying Client Service Officer

Berufserfahrung : **Intermediate**

Tätigkeit : **Bank Syz**

Niederlassung : **Geneva**

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**The candidate must reside in Switzerland for this role.**

If you are passionate about meeting client needs, want to challenge the status quo and be part of an innovative environment and future, the Syz Group can bring you what you are looking for. Working at Syz takes a blend of collaboration, entrepreneurial spirit and willingness to pull together. In return for 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 the opportunity for your voice to be heard and your ideas to be listened to.

## **Purpose of the role**

Support mainly Relationship Managers in various Front Office teams in daily operations, administration, client care and relationship management and become a trusted client service officer. The CSO interacts with internal as well as external stakeholders, provides clients with relevant information and supports the RMs in implementing customized solutions. The role combines operational, administrative, and client servicing responsibilities, ensuring outstanding support to Relationship Managers and seamless continuity across teams.

Furthermore, this person acts as role model in bringing the best service quality in a fast, professional and friendly manner, always living the Syz Group values and thus helping the team to manage and grow its current client base. The CBO assigns the CSO to the different FO teams.

## Ihre Aufgaben

- Assist Relationship Managers in different teams in the day-to-day work servicing clients and handle administrative and operational requests (back-up coverage, specific initiatives)
- Contact clients via telephone and email daily, ensure that prompt action is always taken, as well as a high quality of service and operational excellence
- Execute clients' instructions accurately and timely, process payment and transfer transactions (orders, trades etc.), make sure that call-backs are carried out systematically, and provide support for other types of transactions as required
- Manage fiduciary deposits, loans placements, renewals, execute investment orders (equity, bonds, funds, hedge funds, and private equity, etc), cash and forex transactions, etc.
- Perform cash management for assigned RMs
- Handle new client account openings and KYC reviews – private accounts, companies, operational companies as well as complex structures such as trusts (simple & complex) & foundations – in collaboration with the RM(s), as well as any changes to existing clients accounts
- Solve operational problems with internal and external counterparties

## **Risk Management & Controls**

- Ensure rigorous monitoring of documentation, maintain and update client instructions records, client details and preferences, and ensure compliance with internal and external regulations (AML, FINMA, FATCA etc.)
- Understand Syz's risk management framework and become familiar with risk responsibilities within the team(s) to always ensure adherence to compliance, legal guidelines, internal rules, regulations & policies
- Maintain appropriate knowledge and complete all mandatory training required to gain and maintain your level of competency

and knowledge to perform the role

## Ihr Profil

**Languages:** Fluent in English, any other European language is a plus

### Education & Experience

- Relevant educational (Banking and/or Finance or equivalent) and professional background (work experience in the financial industry)
- 5+ years' experience as an assistant including a solid knowledge of compliance matters (Account opening, KYC, periodic reviews) and investment products
- Solid understanding of relevant products and services in Private Banking
- Basic knowledge of global financial markets and current developments in the industry
- Experience in international and multi-market environments is a strong asset

### Personal and social skills

- Highly service oriented and passionate about client servicing
- High degree of flexibility and adaptability (ability to move quickly between teams and priorities)
- Team player with a positive attitude, a collaborative spirit that shows drive and commitment
- Autonomous, multi-tasking, proactive with a strong sense of responsibility and resilience
- Systematic, precise and diligent working style and the ability to perform under pressure
- The communication style is in a friendly, competent and professional manner
- Reliable and willing to find solutions
- Trustworthy and discreet personality with high level of risk awareness
- Personal integrity and ethical behaviour

### Technical skills

- At ease with IT systems and data management