





## Senior Investment Advisor

- Experience level : Senior
- Activity : Wealth Management
- Office : Geneva

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You are mostly dedicated to our Expert Advisory mandates where you interact directly with clients of different sizes and complexity levels. Additionally you are the investment reference for the European, Swiss and Middle-Eastern teams regarding Advisory Select mandates. As such you promote investment ideas and act as a partner for the Regional Head and Relationship Managers based on the client needs and our wealth management product offering, and are a key link to build investment solutions based on matching client needs. Overall you actively support the RMs in client acquisition and development.

## Your missions

- Responsible for the Expert Advisory mandates for the European, Swiss and Middle-Eastern team, you are the privileged client investment advisor. As such, you provide personalised investment advice within the client risk profile framework, be it on their tactical asset allocation or bottom-up approach.
- Provide support to the RMs effort to grow their book and convert execution only to advisory or discretionary mandates.
- Act as partner for the Regional Head in the tracking of Advisory ideas and their penetration in the clients portfolios, gathering needs from bankers and coming with proposals to address our RMs and clients needs ;
- Contribute to generating investment ideas leveraging on the various internal specialists in all asset classes : equities, fixed income, FX/metals, derivatives, private markets, etc. You participate in the investment committee and actively contribute in the feedback loop with our research team, in order to have investment ideas matching client needs.
- Be the investment reference for the European, Swiss and Middle-Eastern team, you are able to promote the house view, recommended investment solutions, and coach the RMs in solving complex investment challenges
- You drive the Private Equity ideas coming from our internal partners and act as a sounding partner for RMs and clients
- You are an investor yourself, passionate about markets and investments, can translate complex macro and micro topics in a comprehensible manner and adapt to various types of private clients, with different levels of expertise, gaining their trust by acting as a true partner for them.

## Your profile

**Education:** Master in Finance or equivalent

**Professional Experience required:** Min 10 years in a similar role

**Soft skills:** Team work oriented, excellent listening and selling skills, adaptability to client needs.

**Technical skills:** Excellent financial market knowledge (macro, asset classes and instruments). A key strength on equity single stocks is a definitive plus.

**Languages:** Fluency in French and English, written and oral

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