



# Client Service Officer – Zurich

Experience level : Junior

Entity : Bank Syz

Office : Zurich

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 two Relationship Manager(s) / Team Lead in daily operations, administration, client care and relationship management and become their trusted client service officer. The Client Service Officer interacts with internal as well as external stakeholders, provides clients with relevant information and supports the RMs in implementing customised solutions. Furthermore, the CSO 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.

## Key responsibilities

### Client Administration & Management

- Assist Relationship Managers in the day-to-day work servicing clients and handle administrative and operational requests
- Contact clients via telephone 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), cash and forex transactions, etc.
- Analyse and prepare loan applications, assist in drawing up loan agreements, issue loans, guarantees and letters of credit
- Handle new client account openings – 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
- Prepare reports at the request of the clients, the line manager, the Compliance Officer or other authorized persons
- Support RM(s) with all the periodic reviews (PEP, Low and High-Risk reviews)
- Participate in the Bank's events

### 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

## Your profile

**Languages:** English and German

### Education & Experience

- Relevant educational (Banking and/or Finance or equivalent) and professional background (work experience in the financial industry)
- 1-3 years' experience as an assistant including a solid knowledge on compliance matters (Account opening, KYC, periodic reviews) and investment products
- Proven track record in servicing banking clients with complex needs (onboarding new, maintaining and extending current relationships and having demonstrated a commercial mindset to help develop the client book by supporting the Relationship Manager with some business research, events, etc.
- Good understanding of relevant products and services in Private Banking
- Good knowledge of global financial markets and current developments in the industry

### Personal and social skills

- Highly service oriented and passionate about client servicing
- Team player with a positive attitude, a collaborative spirit that shows drive and commitment
- Autonomous, multi-tasking, proactive with a strong sense of responsibility, resilient
- Systematic, precise and diligent working style and the ability to perform under pressure
- Always communicate 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