



# Client Service Officer – EAM Geneva

Experience level : **Intermediate**

Entity : **Bank Syz**

Office : **Geneva**

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 1 Relationship Manager and become her trusted client service officer.

## Key responsibilities

- Assist the Relationship Manager in the day-to-day work servicing clients and handling administrative and operational requests,
- Daily phone contact with clients and ensure that always a prompt action is taken, ensuring high quality of service and operational excellence
- Accurate and timely execution of clients' instructions, process payment and transfer transactions (orders, trades etc.), ensuring that call-backs are carried out systematically, and provide support for other types of transactions as required
- Handle the account openings for new clients – private accounts, companies, operational companies as well as complex structures such as trusts (simple & complex) & foundations - in collaboration with the RM, as well as account changes to existing clients
- Coordinate with lawyers, notaries, company directors, trustees and other intermediaries;
- Analysis and preparation of loan applications, assistance in drawing up loan agreements, issuing loans, guarantees and letters of credit;
- Preparation of reports at the request of the clients, the line manager, the Compliance Officer or other authorized persons;
- Manage the fiduciary deposit & loans placements & renewals, investment orders execution (equity, bonds, funds, hedge funds, and private equity), Cash and FOREX transactions, etc.
- Support with all the periodic reviews (PEP, Low and High Risk reviews)
- Ensure rigorous monitoring of documentation, maintain and update records of client instructions, client details and preferences, by ensuring compliance with internal and external regulations (AML, FINMA, FATCA etc.)
- Establish close relations with the main internal partners (central file, Middle Office teams, Risk & Control functions, etc.) and ensure operational efficiency
- Prepare reports at the request of the clients, the line manager, the Compliance Officer or other authorized person
- Participate in the Bank's events;
- Understand Syz's risk management framework and become familiar with risk responsibilities within the team(s); Ensure always adherence to compliance, legal guidelines, internal rules, regulations & policies

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- Maintain appropriate knowledge to ensure you are fully qualified to perform the role and complete all mandatory training required to gain and maintain your level of competency and knowledge.

## Your profile

**Education:** Education in banking and/or finance

**Professional Experience required:** 8+ years' experience as an assistant, including solid knowledge of compliance matters (account opening, KYC, periodic reviews) and investment products. Already exposed to clients and demonstrated a commercial mindset by supporting the Relationship Manager with business research, events, and client book development.

### Soft skills:

- **Strong client orientation**
  - Commercial appetite
  - Autonomous, multi-tasking, proactive, **strong sense of responsibility, resilience**
- **Strong communication and interpersonal skills**
  - Team spirit and collaborative spirit
  - Positive attitude and showing drive and commitment
  - Rigorous, reliable, attentive to details, organized, and precise with a structured approach
  - Focused on providing the highest quality service to clients
- **Reliable, showing initiative and willingness to find solutions**
- **Discretion and respect for confidentiality**

**Technical skills:** At ease with IT system and data management

**Languages:** Fluent in French & English and Portuguese