International Wealth Planner

Niveau : Senior
Activité : Wealth Management
Bureau : Geneva

The role will have three components:

- Direct Wealth Planning coverage responsibilities for Switzerland and situations with a French nexus;
- Assist the Head of the team on larger and more complex situations; and
- Provide administrative support on internal management, legal, compliance and audit requirements as outlined in the Responsibilities below.

Role encompasses the support of internal and external sales efforts through the delivery of technical and marketing expertise across the Bank's international business (40+ countries) although the focus will be on Switzerland. Knowledge of the French market would be useful even though the Bank does not proactively market into France.

Responsabilités principales

The role of a Wealth Planner within the Syz Group goes well beyond the traditional fiduciary and dispositive planning required in the industry. In large part, this is due to our status as a family-owned bank with a long-term relationship focus requiring Wealth Planners to have a more holistic approach to develop client relationships over different stages in a client's financial lifecycle.

The specific duties of the appropriate candidate will include:

- Helping drive marketing and originate Wealth Planning opportunities either in support of the Head of Wealth Planning or with full individual responsibility
- Providing subject matter expertise on planning and disposition of closely held businesses, formation of family offices, insurance planning, investment holding structures such as companies and funds, cross -border planning for international assets and family members, guidance on relocation, philanthropic assistance and dispositive planning including the use of trusts and foundations
- Coordinating with a client's external professional advisors including the assessment and implementation of potential solutions
- Conducting training for relationship managers to increase knowledge and use of Wealth Planning as a marketing team rather than a help desk and enhance the reputation of Wealth Planning internally
- Assisting the Head of Wealth Planning in tracking performance metrics and activity follow-up
- Conducting and monitoring due diligence on contractual counterparties and liaising with legal on counterparty agreements
- Coordinating with internal colleagues including tax, legal and the Swiss pensions solutions team to ensure a coordinated, collaborative approach
- Team player willing to pitch in to support the Wealth Planning effort, from preparing marketing materials to drafting internal communications for business and regulatory updates
- Maintaining relationship with internal compliance, internal controls and audit to ensure proper conduct of business
- Assisting in the onboarding and relationship management of insurance counterparties

Profil

Experience & skills

- 10+ years of experience in legal, tax and private client planning for Switzerland

- 10+ years of experience in legal, tax and private client planning for Switzerland
- Direct client facing experience and a self-starter with experience in owning relationships and seeing transactions through to completion
- Detailed understanding of the cross-border regulatory environment and implications for Wealth Planning
- Solid understanding of insurance structures as an investment and/or estate planning tool
- Knowledge of generational planning concepts and fiduciary structures and their application on a multi-jurisdictional basis
- Experience with the formation of family offices and considerations in philanthropic structuring
- Financial markets knowledge and corporate structuring experience is helpful though not required

Personal and social skills

- Highly service oriented and passionate about client servicing
- Leadership and driven attitude
- 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 behavior