Investment Advisor

Livello di esperienza : Intermediate
Attività : Bank Syz
Ufficio : Geneva

Based in Geneva, you will serve as the investment representative of the Front team for advisory mandates and structured products. You will engage directly with clients of varying sizes and complexity, or through their respective Relationship Managers. In this role, you will promote investment ideas and act as a trusted partner to the Regional Head and Relationship Managers, aligning client needs with our wealth management offering. You will play a key role in designing investment solutions tailored to client objectives and actively support RMs in client acquisition and development.

You are an investor at heart, passionate about markets and investments, with the ability to translate complex macro and microeconomic topics into clear, actionable insights. You adapt to diverse private client profiles and levels of expertise, earning their trust by acting as a true partner.

Le sue missioni

Structured Product activity:

- Support the Structured Product team by providing accurate and timely pricing to the Front.
- Help in managing the full product lifecycle, including daily monitoring, redemption notifications, secondary market opportunities, and roll or switch proposals.
- Contribute to the development and animation of the structured product offering through idea generation, market intelligence, and collaboration with research teams.
- Ensure seamless execution across all stages of the process — from pricing and RFQs to post-trade activities (term sheet validation, booking, instrument setup), as well as invoicing and P&L reconciliation.
- Promote the structured product asset class internally by educating relationship managers and supporting the use of pricing tools when appropriate.
- Build and maintain strong relationships with counterparties, overseeing onboarding processes including KYC and contractual documentation

Investment Advisory:

- Provide personalised investment advice within the client risk profile framework, be it on their tactical asset allocation or bottom-up approach.
- 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 actively contribute in the feedback loop with our research team, in order to have investment ideas matching client needs.
- Be able to promote the house view, recommended investment solutions, and coach the RMs in solving complex investment challenges.

Il suo profilo

Education: Master's in finance or equivalent

Professional Experience required: Min 5 years in a similar rolewith a very good knowledge on Structured Products

Soft skills:

Soft skills:

- Creative and entrepreneurial mindset, combined with strong team spirit
- Ability to clearly articulate and pitch the technical aspects of asset classes
- Strong client focus, demonstrating involvement and initiative
- Excellent listening and consultative selling skills, with adaptability to client needs
- Capability to make timely, well-reasoned investment decisions, balancing fact-based analysis with intuition, information, and experience
- High standards of professionalism and integrity
- Pragmatic and results-oriented approach
- Resilient under pressure, able to thrive in a fast-paced, changing environment
- Meticulous attention to detail, with strong analytical skills, intellectual curiosity, and proactive attitude

Technical skills: Excellent financial market knowledge (macro, asset classes and instruments).

Languages: Fluency in French and English, Portuguese is a plus, written and oral