

Investment Advisor

Experience level : **Intermediate**

Entity : **Bank Syz**

Office : **Geneva**

Purpose of the role: Based in Geneva, you are the investment face of the Front team regarding advisory mandates. You will interact directly with clients of different sizes and complexity levels, or through their respective relationship managers. As such you will 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.

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.

Key responsibilities

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 Team Leaders and Private Bankers in the tracking of Advisory ideas and their penetration in the clients' portfolios, gathering needs from the front and coming with proposals to address our 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, structured products, etc. You actively contribute to 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.

Your profile

Department/Team: Advisory

Reporting to: Head of Advisory

Education: Master's in finance or equivalent

Professional Experience required: Min 5 years in a similar role

Soft skills:

- Creative and entrepreneurial mindset, as well as team player
- Ability to clearly articulate and pitch technical aspects of asset classAbility to work cross-functionally and influence senior stakeholders.
- Strong client focus mindset with strong involvement and initiative
- Excellent listening and selling skills, adaptability to client needs
- Capability to take timely and well-reasoned investment decisions (analyse issues and balance fact-based analysis with intuition, information and experience)
- High standard of professionalism and integrity
- Pragmatism and result-orientation
- Able to work under pressure and in a fast-moving, changing environment.
- High attention to details, analytical, intellectually curious and proactive

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

Languages: Fluency in French and English, other languages are a plus (Portuguese or Spanish)