



# Senior Private Banker

## Eastern Europe

m/f, with proven track record for our offices in Zurich, Switzerland

Need a change? Are you feeling frustrated and confused with the constant change in senior management, organisational structure, strategy and conflicts of interest at your present workplace? Unlock your outstanding client relationship talent for the benefit of your clients and yourself in creating a partnership with a leading wealth manager – Marcuard Heritage.

### **Your Responsibilities:**

- Possess exceptional track record in acquiring and managing a sizeable book of business (AuM);
- Maintain and grow your book of business consisting of UHNWI/HNWI individuals and families;
- Deliver exceptional client service and work with the asset management unit to provide sophisticated financial advice across a range of products and asset classes;
- Advise on tailor-made solutions to meet clients' requirements and collaborate with the wealth planning unit in the creation of wealth planning solutions;
- Maximise the acquisition and retention of clients of the family office and identify new business opportunities;
- Develop prospects directly or via established networks by leveraging on the strong brand;
- Operate as part of a multi-functional, culturally diverse team;
- Ensure that all your offered services are conducted in compliance with relevant law and regulatory requirements;
- Keep abreast of industry knowledge in your fields of expertise;

### **Your Qualifications:**

- Significant experience as Private Banker with an established client portfolio of UHNWI/HNWI individuals and families;
- Proven track record in client relationship management and acquisition as well as generating both revenue and client satisfaction in wealth management;
- Strong and broad understanding of compliance and regulatory requirements;
- Broad knowledge of the industry and thorough understanding of the culture and business acumen in your target markets;
- Highly entrepreneurial spirit;
- Self-motivated, dynamic personality with an ability to work independently;
- Mature and self-confident personality with a high level of integrity;
- You are not a product seller, but an innovative and creative solution provider;
- Excellent communication and proven client management skills;
- Solid educational background with ideally a recognized financial qualification;

Due to regulatory restrictions, we will only be able to consider applications from applicants with a valid work permit in our respective business location.

**By applying to this job vacancy, you agree to the collection, recording and processing of your personal data and make your personal data available to Marcuard Heritage AG and its affiliates in order to perform the job search and/or the staffing for this position. Your data is stored and processed on our IT systems and BambooHR.**

**[Apply online](#)**