



Senior private banker

f/m/d,

with a proven track record for our office in Zurich, Switzerland

Do you need a change? Are you feeling frustrated with constant changes in senior management and organizational structures, shifting strategies, or conflicts of interest at your present workplace? Are you a talented relationship manager with an established client portfolio? Then perhaps it's time to gain some independence and unlock your potential for the benefit of both you and your clients by partnering up with one of Switzerland's leading wealth managers.

Marcuard Heritage AG is a FINMA-licensed portfolio manager founded in 2003 and headquartered in Zurich. Marcuard Heritage AG forms part of [Marcuard Heritage Group](#), an international network of regulated financial services providers in Singapore, Cyprus, and Switzerland. Marcuard Heritage AG provides holistic wealth management services to UHNWIs and their families.

Your Responsibilities:

- Maintain and grow your book of business consisting of UHNW/HNW individuals and families
- Deliver outstanding client service and work with our asset management unit to provide sophisticated financial services across a range of investment products and asset classes
- Create tailor-made wealth planning solutions to meet clients' needs in collaboration with our wealth planning partners
- Maximise both client acquisition and retention and identify new business opportunities
- Develop prospects directly or via established networks by leveraging our strong brand and our well-positioned wealth management organization
- Be part of and work closely with a multi-functional, culturally diverse team of financial experts
- Ensure that all your services comply with the relevant laws and regulatory requirements, supported by our seasoned compliance team
- Keep abreast of industry news and developments in your fields of expertise

Your Qualifications:

- Exceptional track record in acquiring and managing a sizeable book of business (AUMs)
- Significant experience as a private banker with an established client portfolio of UHNW/HNW individuals and families
- Proven track record in client relationship management and new client acquisition as well as in generating revenue and ensuring satisfied wealth management clients
- Strong and broad understanding of compliance and regulatory requirements
- Extensive knowledge of the industry and thorough understanding of the culture and business acumen in your target markets
- Self-motivated and dynamic with an ability to work independently: You are not an investment product salesman, but an innovative provider of holistic solutions
- Highly entrepreneurial spirit
- High level of integrity and loyalty
- Excellent language skills and cultural knowledge of your clients' markets with strong communication and proven client management skills
- Solid educational background, ideally with a financial degree or certificate from an accredited institution



By applying for this position, you consent to the collection, recording, and processing of your personal data and grant Marcuard Heritage AG and its affiliates permission to use your data to perform tasks related to staffing this position. Your data will be stored and processed in our IT system in line with applicable data protection laws.

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