



Assistant to Relationship Manager (80-100%)

m/f/d, Zurich

Marcuard Heritage is a wealth management company with a team of over 60 experts specialized in key markets and dedicated to providing investment and wealth planning solutions for clients with complex financial needs.

If you are experienced and passionate about what you do and if you're looking for a professional home built on solid principles, we want to hear from you.

Your Responsibility:

- Partner with relationship managers to manage client relationships on a day-to-day basis.
- Prepare trading orders in main asset classes: FX, equities, fixed income, funds, and structured products.
- Ensure adherence to compliance, legal guidelines, internal rules, regulations, and policies.
- Administer and coordinate the end-to-end account-opening process with custodian banks for clients.
- Gather KYC-information, supporting documents and ensure its documentation in the CRM tool/client file.
- Support relationship-managers in client-related projects as and when required.
- Additional administrative tasks.

Your Profile:

- Successfully completed bank apprenticeship and/or bachelor in banking and finance.
- Minimum three years working experience in similar position with a Swiss based private bank.
- Good knowledge of banking and investment products.
- Team-player who demonstrates high level of service orientation towards clients.
- Detail oriented, reliable and sense of responsibility and proactivity.
- Solid knowledge in Microsoft O365.
- Fluent in English and any other language is an advantage.

Does this challenge appeal to you? Would you like to work in a small, familiar, and dynamic environment? Then we look forward to receiving your application.

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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