



Investment Specialist – 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 and clients to manage client portfolios on advisory or discretionary basis.
- Engage with the whole Investment Solutions team and support in the idea generation process.
- Support in daily tasks for the whole investment offering.
- Voting member of the investment committee.
- Co-lead to build a single stock offering including monitoring and maintenance.
- Support the whole organisation in any investment related matters.
- Cooperate with affiliates in other jurisdictions.

Your Profile:

- Preferably University degree in Finance, economics or equivalent ideally complemented by a financial analyst diploma (i.e. CFA, CIIA)
- Several years working experience in similar position.
- Strong knowledge of banking and investment products, specifically equities.
- Team-player who demonstrates high level of service orientation towards clients, with the ability to take and lead initiatives.
- Team oriented, reliable and sense of responsibility and proactivity.
- Solid knowledge in Microsoft O365 and Bloomberg.
- Excellent written and spoken English skills. 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.

[Apply for this position](#)

For further information, please get in touch with our external HR partner HC Solutions, Chantal Malcolm at Tel.: +41 44 915 12 12, www.hcsolutions.ch.

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.