OPEN POSITION

Senior Wealth Planner Zürich

Reference	WP_V2 – JC-2353
Department	Investment Solutions/ Rivolta Alfonso
Work time percentage	100%
Location	Zürich / Switzerland
HR contact	Online Application
Date of publication	13.10.2020
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Main responsibilities

Our Wealth Planning team is part of the Investment Solutions department and supports all Private Banking regions in many global locations.
Our Wealth Planners use their significant legal and fiscal knowledge to work together with CROs, clients, and their professional advisers to find the best solutions to any issue concerning the management, protection and transfer of the clients' wealth.
Our Wealth Planners also support Investment Solutions and other divisions for complex matters involving tax and legal expertise, for issues related to Clients and P&S offering.

For our Wealth Planning team in Zürich, we are currently looking for a Senior Wealth Planner dedicated to international and Swiss clients, with a strong knowledge of Swiss and international tax and civil law, in addition to the main wealth planning products and services available on the international market.
Main responsibilities include:

- A professional and detailed support to our private banking department on the a.m. topics, including meeting clients or external professional firms together with private bankers;
- A continuous update on legal and tax developments as regards the covered topics, supporting other internal functions in developing the relevant offering;
- The creation and update of internal manuals, newsletters, presentations, on the a.m. topics, for internal and/or external use; presenting in internal or external events will also be required;
- The coordination of the information flows between Private Banking and external Service Providers on the a.m. topics;
- The participation or the lead on possible projects linked to wealth planning topics.

Skills and experience

The ideal candidate shall have the following skills:

- At least 10 year experience in banks / financial institutions / big4 / law & tax firms, with a focused know-how on Swiss and international taxation, civil law matters and international law related to individuals and families (succession planning, estate planning, pension planning) and the most typical wealth planning solutions (e.g. trusts, testamentary wills, life insurance products);
- University degree in Law or the like; preference will be given to candidates holding additional qualifications linked to the area of interest (e.g. admission to the bar; TEP, LL.M. in tax, qualification as Swiss Tax Expert);
- Strong communication skills: ability to communicate and make presentations for clients / private banking colleagues;
- Strong organizational skills, structured approach, strict adherence to compliance requirements;
- Independent, entrepreneurial and pro-active approach;
- Some experience in project management as an element of preference (linked to the areas of interest);
- Availability to travel in Switzerland;
- Languages: German and English are strictly required. Other national languages would be considered a plus.

Our company

EFG Bank is the Swiss private banking subsidiary of EFG International. Headquartered in Zurich, it has an international network spanning Europe, Asia Pacific and Latin America, and manages assets for private clients all over the world. The bank's services comprise asset management and investment counselling, investment funds, securities brokerage, estate planning and a full array of banking services. EFG Bank offers a stimulating and dynamic work environment.

Application

Should you wish to apply for this position,
please send your complete job application by email to
https://emea2.softfactors.com/job-opening/rstOnax-Fqv3FPKVDottZQH68N#/?lang=en

We will only respond to applications with a matching profile.