

Head of Advisory GVA

Reference	JC-2656
Department	Investment Solutions
Work time percentage	100%
Location	Geneva / Switzerland
HR contact	Online Application
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As the manager of the Local Investment Advisory team in Geneva, you will be responsible for the advice of investment solutions to clients and prospects, with the primary objective of partnering with Private Banking Client Relationship Officers (CRO) to offer appropriate investment solutions, both discretionary and advisory, and attracting/enhancing client relationships and profitability.

Main responsibilities

- Manage and develop the regional Advisory team. Ensure that the team is skilled, motivated, proactive and communicative. Comply with all regional regulations, Directives and the Code of Conduct.
- Provide Advisory services according to the regional service model(s) to Private banking CROs (i.e. managing Advisory mandates and/or providing transactional Advice etc.). Deliver the Advisory service promise in a proactive, individual and professional way. Act in a client- and solution-oriented manner.
- Ensure regulatory compliance of Advisory services and support Compliance / Product Management for EFG Directives and rules.
- Support the growth in Discretionary Mandates (DPM) by supporting the PM team in their sales efforts.
- Maintain and develop controlling measures: manage the regional team budget (MbO), track Advisory activities, manage your pipeline as well as your cost and headcount
- Partner with regional PB Heads, PB teamleaders, CROs and all relevant stakeholder (incl. all Investment Solutions entities).

Skills and experience

- University degree in economics or finance, or comparable qualifications (CFA, etc)

- Minimum 5 years in field of investment advisory, portfolio management, or similar in a Private Banking or Investment Management environment
- Relevant leadership experience in managing a team.
- Able to establish good working relationships and appear as a credible and trustful partner for our CROs.
- Entrepreneurial thinking and ability to work under pressure
- Results oriented with ability to proactively and independently solve problems
- Excellent verbal and written communication skills in French and English.
- Solid skills in MS Office and Bloomberg

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-bx7KHeBMowjWxYebYn#/?lang=en>

We will only respond to applications with a matching profile and having a valid Swiss/EU work permit.