

LatAm Investment Counselor

Reference	JC-2554 LatAm Investment Counselor
Department	Investment Solutions
Work time percentage	100%
Location	Zurich / Switzerland
HR contact	Online Application
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As a member of the LatAm Local Investment Advisory team, 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

- Provide investment advice and solutions to CROs and their clients on global products including fixed income instruments, equities, funds, hedge funds, derivatives and structured products
- Develop a close collaboration with CROs, assure a high availability for client meetings
- Implement advisory mandates booked locally
- Assist CROs in sourcing discretionary mandates where appropriate
- Serve as main point of contact for CROs for all investment matters
- Proactively conduct book reviews and portfolio analysis & health checks with the CRO and agree on actions to close gaps, leading to reduced risks and higher client activity
- Monitor CROs satisfaction
- Spot client opportunities and source investment ideas
- Develop and share product ideas
- Cover local investment products to reflect local needs
- Support on Suitability & Appropriateness aspects

Skills and experience

- University degree in economics or finance, or comparable qualifications (CFA, etc)
- Good and broad knowledge of financial markets, investment products and services

- Minimum 5 years in field of investment advisory, portfolio management, or similar in a Private Banking or Investment Management environment
- Able to establish good working relationships
- Excellent verbal and written communication skills in Spanish and English. In addition, Portuguese would be highly appreciated and valued.
- Experience with Latin American clients
- Entrepreneurial thinking and ability to work under pressure
- Results oriented with ability to proactively and independently solve problems
- Solid skills in MS Office and Bloomberg

Please note that this position can also be located in Geneva.

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-25x5VhFePsqvqNlK5u#/?lang=en>

We will only respond to applications with a matching profile.