

# IAM Investment Advisor

<b>Reference</b>	JC-2641
<b>Department</b>	Region Switzerland & Italy /IAM Switzerland/IAM Investment Advisory
<b>Occupation</b>	80% - 100%
<b>Location</b>	Zurich
<b>HR contact</b>	<a href="https://emea2.softfactors.com/job-opening/rstOnax-iBHpvXNbqNbeKRgTML#/?lang=en">https://emea2.softfactors.com/job-opening/rstOnax-iBHpvXNbqNbeKRgTML#/?lang=en</a>
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## General Description

Act as investment Specialist / Advisor for the IAM. As such, the investment Advisor is at the centre of cross-asset investment expertise.

## Main responsibilities

- Acts as Investment Advisor for the existing IAMs by proposing investment ideas across asset-classes, analysing IAM portfolio data, defining proactively a tailored investment solutions for the IAM;
- Assists IAM Desk in acquiring new business and identifies investment solutions that match IAM needs;
- Attends internal meetings representing the investment expertise of the IAM area (area management meeting, investment specialist meetings etc.);
- Connects with the EFGAM and Investment Solutions team to fully leverage the potential of the investment experts;
- Attends and performs proactively external investment and product presentations to the IAM community in single meetings or conferences.

## Skills and experience

- Minimum 10 years of previous experience in a financial services firm;
- Fluency in English and German. French as a plus;
- Ability to cope with pressure and highly dynamic environment;
- Perfect knowledge of financial instruments (equities, bonds, structured products, derivatives);

- Strong knowledge of the IAM business and established network of IAMs in Zurich;
- Able to use financial tools, such as Bloomberg, FactSet, Refinitiv;
- Teamwork Ability to work in a small team across locations;
- Highly motivated, with strong financial market sense;
- Creativity, pro-activity, and self-motivation in business development;
- Displays flexibility and independence.

## 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-iBHpvXNbqNbeKRgTML#/?lang=en>