



BiermannPartners AG

Our core competence lies in the worldwide identification, direct address and evaluation of executives and specialists in banking. Thanks to the very close contact to executives and strategic decision-makers, we generate unknown possibilities and ideas consecutively. During the selection process of the best associates possible, we set ourselves apart from our contestants with new ways and define ourselves through confidence, reliability, teamwork and flexibility. We are executive search consultants – but we even more see ourselves as “information managers”.

Senior Portfolio Manager / Investment Advisor, Zurich

Company

Our client is a private bank serving over 70,000 clients in the UK and internationally. It offers a holistic service to clients, through a variety of products and services, through a network of 32 offices, three of them in Switzerland. For its Zurich office, we are looking for an exceptional Senior Portfolio Manager to proactively service with investment advisory to UHNW clients domiciled in UK.

Key Tasks & responsibilities

As Senior Portfolio Manager you will service proactively UHNW clients mainly UK domiciled. As specialist for UK client portfolios within a team of professional Portfolio Investment Advisors you not only speak the language, but also understand the culture of your clients. Knowing the products you service your clients with professional advices also with regards to local regulatory policies and guidelines for Investments and tax matters. Based in Zurich you will visit your clients in the UK on a regular basis. Your first class investment advice and portfolio management service will be on an advisory or discretionary level to private clients of the bank. Advice covers a holistic approach to portfolio management and encompasses all major financial asset classes. Align all accounts towards the Bank's investment strategy and manage all accounts accordingly while working with Private Bankers and Investment Consultants to develop new client relationships. Knowing the market as well as your clients needs you provide support in way of recommendations and portfolio proposals for new and prospective clients.



Required Profile

You have a university education as well as an additional professional qualification such as CFA, CFPI, CIIA, etc. With a proven experience of working as an investment advisor of at least 5 years you have a track record of working with UK domiciled clients. Additionally, you are experienced in managing portfolios in the UK for UK clients. Thanks to your excellent knowledge about financial markets as well as different asset classes and your good understanding of portfolio management you have the technical expertise and ability to discuss a broad spectrum of asset classes in a credible manner. Further, you bring excellent communication and proven client management skills with the ability to express complex ideas in a clear and comprehensive manner. You are a proactive personality with a 'can-do' approach-capable of working with strategic thought and action and have the ability to work in an entrepreneurial, delivery-focused, driven manner. You are fluent in written and spoken English . Other languages such as i.e. Russian or Ukrainian are highly desirable.

Contact

If this job description suits you, we are looking forward to get to know you personally. You can send your application dossier to bettina.schoch@biermann-partners.ch. For any further questions, please do not hesitate contacting us on +41 44 213 62 23.