

Job Specification

Job Title: Client Executive Service Desk
Division: Private Clients
Full time / Part time: Full time
Location: Zurich

Rothschild & Co.

Rothschild & Co is one of the world's largest independent financial advisory groups. We offer a distinct perspective that makes a meaningful difference to our clients' business and wealth.

With a team of 3,400 talented financial services specialists on the ground in 40 countries across the world, we provide independent advice on M&A, strategy and financing, as well as investment and wealth management solutions to large institutions, families, individuals and governments. As a family-controlled business that has been at the centre of the world's financial markets for over 200 years, we can rely on an unrivalled network of specialists and are known for our track-record of outstanding execution in financial services.

Rothschild Private Wealth

For over 200 years, Rothschild's freedom to offer objective advice and our commitment to personal service have combined to shape and grow our private clients' wealth, building value for generations. Our dynamic growth and ambitious targets in relation to quality, innovation and reliability have created a need for the above mentioned role.

Click here for more information on [Rothschild Private Wealth](#).

Overview of Role

Support the Head in daily business

Responsibilities

- Interaction with clients, clients' representatives, external advisers on structures set up via meetings, phone calls and e-mails
- Managing independently a Spanish EAM by providing high quality service and timely execution of trade orders, payments (including checking signature rights and account balances), loans and account openings as well as client visits
- Deputy for serving our Frankfurt, Hong Kong, Singapore and Milan offices as well as other EAM's and Employee accounts
- Responsible for a small client book where the main task is to solve open issues (documentations) and check clients further potential



- Responsible for timely and correct execution of payments for Rothschild Continuation Holdings accounts
- Deputy of KYC Manager when required
- Organisation, coordination and preparation of internal and external meetings, conference calls, preparation of meeting- and call- notes
- Effectively handling of internal and external calls and taking appropriate actions
- Analysis and high-level due diligence of financial and legal documentation on companies and assets going into the new clients structures in order to prepare structure charts and assets description
- Preparation of presentations, pitches, specific client documents and client materials

Education and Qualifications

- Bachelor degree in business related subject is an advantage

Experience, Skills and Competencies Required

- Experience in the financial industry an advantage
- Very good in English, Spanish and German (written & spoken)
- Computer literate (MS Office)

Additional skills & competencies

- Strong communication skills / good team spirit
- A “can-do” attitude, seeking continuous service improvement, high quality standards
- Attention to detail a must, ability to follow directions meticulously, a keen learner and ability to apply knowledge across diverse mandate structures
- Distinctly reliable and precise, conscientious, professional with good demeanour and interaction with all persons