Job Specification

Job Title: Investment and Portfolio Adviser
Division: Investments
Full time / Part time: Full time
Contract type Permanent
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 & Co Wealth Management

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 & Co Wealth Management.

Overview of Role

We are seeking a senior investment professional with a proven experience in investment advisory or portfolio management coupled with regular client interactions to strengthen the central advisory team.

Responsibilities

- Overseeing and managing of advisory client relationships through the front representatives
- Increase advisory penetration within the Bank
- He/she will be involved in all kind of client interaction
- Idea generation across asset classes including delivery to Client Advisers

- Supporting Client Advisers in all aspects related to day to day investment advisory
- Participate to client meetings in-house and outside the Bank with Client Advisers
- Coordination and preparation of regular portfolio reviews and bespoke portfolio proposals
- Active interaction with the specialists in the research department in order to derive investment ideas
- Support and actively contribute in investment meetings

Education and Qualifications

- University degree in Finance or Business Administration
- Further related education (CFA, AZEK) is desired

Experience, Skills and Competencies Required

- Several years of relevant job experience in advisory, portfolio management or research in a multi-asset context
- The candidate should be an investment professional with an affinity to multi-asset investment management and client interaction
- Affinity for financial markets, investments and trading
- Very good understanding across asset classes and financial instruments
- Experience in dealing with private clients is desired. The candidate must feel comfortable to adapt his/her communication style to different levels of sophistication
- Fully computer literate (MS Office, Bloomberg)
- Fluent in English and German. Any other languages are an asset
- Team player, ethical attitude
- High quality standards with business drive and a “can do” attitude
- Capable of working under pressure and efficiently prioritizing tasks
- Outgoing personality with excellent communication skills

If you are curious to learn more about us and have valuable experiences in a similar role, then please submit your CV and Cover Letter through our recruitment tool.