

SENIOR ASSOCIATE – CLIENT MANAGEMENT

*Stonehage Fleming is one of the world's leading independently owned family offices.
We help international families manage their wealth and protect their legacies
for generations to come.*

Stonehage Fleming provides a range of services from long-term strategic planning and investments to day-to-day advice and administration to well over 250 substantial families of wealth. The Group employs over 540 people in 11 offices in 8 geographies around the world.

OVERALL PURPOSE

We are currently seeking to appoint a **Senior Associate – Client Management** in our Investment Management department based in Zurich, Switzerland.

The main purpose of the role is to manage numerous development projects in Switzerland at any given time, assist in building new and maintaining client relationships whilst maintaining efficiency, quality and accuracy of work produced. While collaborating closely with senior CRM's, the individual will provide professional advice and expert administration. He/she will be responsible for winning new mandates for the company/Group of companies.

The position reports to the Head of Swiss Investment Management. This role involves close and regular interaction with existing and potential future clients as well as business contacts (i.e. Asset Managers, Lawyers, Bank Managers, Insurance Agents, Estate Agents, Art Curators, Tax Advisors, ..) and with internal departments and business units.

PRINCIPAL ELEMENTS & ACCOUNTABILITIES

- Advise clients on all Group offerings
- Build and maintain long term relationships with clients which includes all forms of contact/communication with clients and their advisers
- Run affairs of clients including preparing meeting documents, analysing performance of investments, valuing investments; analysing costs
- Develop and maintain relationships with internal departments of the Group including legal, trust, accounting, investments, treasury & banking, philanthropy, property, etc. to effectively manage the clients' affairs
- Undertake business development/marketing activities to acquire new clients through own network or which have been referred to the Group through its networks/contacts
- Responsible for winning new asset management mandates for the company or the Group, as appropriate

QUALIFICATIONS AND EXPERIENCE

- Degree in Finance/Economics
- Min. 5 years of Private Banking and Client Relationship Experience

SKILLS

- German mother tongue
- English at business level (minimum C1)
- French/Italian/Spanish - a plus
- Good Microsoft Office skills
- Experienced Private Banker and in depth knowledge of investment markets and private banking clients

COMPETENCIES AND BEHAVIOURS

- Understands & satisfies client needs at all time; delivers excellent client service
- Feels comfortable to have a conversation with the client and shows the necessary negotiation skills needed
- Shares information timely
- Has the necessary presentation skills towards internal and external partners / clients
- Demonstrates tenacious cost consciousness for the business
- Maintains client relations & actively seeks new business
- Effectively negotiates fees
- Shows flexibility in working situations; Open to travel for business
- Persists in effort to achieve goals
- Understands the Stonehage Fleming Family Office Business Model and is able to explain it to any external person
- Excellent interpersonal and communication skills with the ability and maturity to deal effectively with all levels of staff and management within the Group, third party professionals as well as very demanding clients
- Strong client care/ service orientation
- Risk oriented mindset, sharp analytical mind, good numeracy skills and a strong commercial awareness

We offer you the opportunity to work in an enjoyable environment within an international, fast growing organization.

Contact: Mina Bloudanis Ventrice, recruitment.ch@stonehagefleming.com

Interested candidates are requested to respond by email.



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