



Mirabaud is an international banking group that provides a clientele of private and institutional investors, companies and finance professionals with highly customised investment, private banking and asset management services.

Headquartered in Geneva, Mirabaud has evolved steadily over the years and now employs over 700 staff who, through their experience and expertise, perpetuate the entrepreneurial spirit that has guided the bank since its foundation in 1819. The Group now conducts its **Wealth Management, Asset Management and Securities** businesses in the main financial centres around the globe and has offices in Switzerland, the UK, Luxembourg, France, Spain, Italy, Canada, the United Arab Emirates, Brazil and Uruguay.

Our LATAM department within our Wealth Management division is looking to add an :

Sr Assistant / Jr RM Farmer

Main Responsibilities:

- 1) Actively support Relationship Manager in managing their portfolio of clients :
 - Carry out various administrative tasks (preparation of correspondence, expense reports, management of telephone calls and agendas, etc.) and manage incoming and outgoing correspondence.
 - Prepare, update and follow-up on account opening and closing documentation. Ensure the transmission, entry and follow-up of client orders (stock exchange, foreign exchange, loans, fund transfers, credit limit set-ups etc.).
 - Assist in preparing clients KYC and related updates.
 - Ensure the daily follow-up of the balance position and the movements of the customers' accounts.
 - Create and build a trust-based relationship with the existing clients through regular and personalized contact.
- 2) Proactively maintain and develop a portfolio of clients :
 - Respond to all client needs in a timely and professional manner. Ascertain and assess the client's financial situation and overall objectives with the support of the Team Head if needed.
 - Monitor your pipeline according to the objectives.
 - Provide general wealth management services to the clients, namely by formulating integrated solutions (in close relationship with the specialist department such as legal, tax, financial, etc.) based on the client's objectives.
 - Manage client assets in accordance with the investment guidelines and in accordance with the Investment department.

Candidate's Profile:

- Min. Commercial diploma, ideally university degree completed with trainings in banking operations, products and compliance. CWMA, CIIA or CAIA is a plus.
- Min. 10 years' experience as RM Assistant or 5 years' experience in a RM position in a Swiss Bank or with an independent asset manager in Switzerland. Knowledge of LATAM market is an asset.
- Excellent knowledge of wealth management products and services as well as deep knowledge of compliance rules and Swiss regulations.
- Outstanding sense of organization and priorities, flexibility, excellent client and service orientation, ability to work in a team, autonomy and ability to take initiatives.
- Fluent in English, Spanish and Portuguese.



Mirabaud Group is an Equal Opportunity Employer.

If you are interested in this role, please send your application via email to the following address:

recrutement@mirabaud.com

If you would like to **pursue a career within the Mirabaud Group**, please send us your CV to the same email address.

Notes:

Please be aware that Introductions from recruitment agencies will not be considered.

Only candidates with a suitable profile will receive a response.