

Opportunity



Position: Investment Advisor – Brazilian Clients

Location: Geneva

Reference: DA350

A challenging role for an asset management sales specialist who is able and keen to put their investment expertise to use in advising private clients on active advisory investment solutions and portfolios. This opportunity requires fluent Portuguese as the successful candidate will be focussed on servicing and developing Brazilian clients.

Role

Joining an experienced and motivated team, you will advise relationship managers and their clients (HNW and UHNW) on active advisory solutions. In addition to your technical skills across a broad range of asset classes, you will be required to communicate with clients of various levels of investment sophistication to explain the structures, risk factors and potential performance potential.

- Actively contribute towards the growth and retention of the bank's AUM by providing its existing client base with sophisticated investment solutions.
- Network within the bank to source / structure the best solutions for clients.
- Prepare investment proposals for Private Clients, based on thorough analysis of their existing wealth, portfolio, and their risk appetite.
- Active management of client portfolios including execution and confirmation of trades and maintenance of relevant client records and information.

Requirements

- CFA, CEFA, AZEK or equivalent professional experience
- At least 4 years' experience asset management, advisory, or sales
- Prior experience in advising Private Clients desirable
- Understanding of portfolio management and risk
- Broad experience across a wide range of asset classes
- Ability to communicate with all personality types and build trust
- Fluent Portuguese and English required

This could be **your** next, exciting career move. Initiate contact with us by sending your current CV to info@dartexec.com or calling us on +41 44 215 1080.