

# Opportunity



**Position:** Wealth & Tax Planning Advisor (LatAm)

**Location:** Zürich

**Ref:** DA400

For our client, a respected private bank, we are looking for a Wealth & Tax Planning Advisor (LatAm) to join the team here in Zürich. Working within a strong team, you will work closely with Relationship Managers responsible for the Spanish/Portuguese speaking markets. If you have a Law degree, strong language skills and experience with international investment structures this could be an ideal fit for you.

## Role

Your key responsibilities will include:

Working with Relationship Managers in offices around the world structuring innovative financial solutions for clients such as trusts, foundations, collective investment schemes etc.

Good mix of structuring and advisory responsibilities with clients and relationship managers throughout the entire sales lifecycle, from analysing the wealth and requirements of a client through to advising on a tailor made solutions and structuring them accordingly.

Leading projects to handle diverse client cases.

## Requirements

- Law or tax-law degree plus specialist qualifications such as STEP or CFP
- Minimum three years of experience either in an investment management firm or law office
- Self-starter with a methodical approach to your work and able to lead projects working with diverse groups of people
- Spanish and/or Portuguese, English and proficient German
- Willingness to travel

This could be **your** next, exciting career move. Initiate contact with Chandler Robinson at DART by sending your current CV to [info@dartexec.com](mailto:info@dartexec.com) or calling us on +41 44 215 1080.