

Opportunity



Position: Senior Wealth Planner

Location: Zürich

Ref: DA407

For our client, a respected private bank, we are looking for a Senior Wealth Planner to join the team here in Zürich. Working within a small team, you will work closely with Private Bankers responsible for the Eastern European markets. If you have a Law degree and/or STEP qualification and experience with international investment structures this could be the next role for you.

Role

Your key responsibilities will include:

- Working with Private Bankers structuring innovative financial solutions for clients such as trusts, foundations, collective investment schemes etc.
- Good mix of structuring and advisory responsibilities with clients and Private Bankers
- Involvement in the entire sales lifecycle, from analysing the requirements of a client through to advising on a tailor made solutions and structuring them accordingly.
- Working with Head of Wealth Planning Switzerland/Global Head of Wealth Planning to train Private Bankers and Wealth Planners

Requirements

- Law or tax-law degree and/or STEP international diploma
- Minimum seven years of experience in an investment management firm
- Self-starter with a methodical approach to your work and able to lead projects working with diverse groups of people
- Fluent English; Russian would be an advantage
- 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 or calling us on +41 44 215 1080.