

Opportunity



Position: Head of Wealth Planning EMEA

Location: Geneva or Zurich

Reference: DA425

This exciting role within a leading international bank requires a senior professional with extensive experience of wealth planning within a private bank. You will play a key role in the development of the wealth planning offering of the bank across the EMEA region and lead the current team of wealth planning professionals. The role requires a combination of both strategic management and hands on advisory responsibilities.

Role & Key Responsibilities

- Take ownership for the full wealth planning operation for the bank across the EMEA region, supporting the engagement of the wealth planning team with sales and end clients (HNW and UHNW).
- Develop and improve the capability of the team to provide “best in class” service and contribute significant revenues to the bank
- Work collaboratively with the Senior EMEA Private Banking team to define the strategy and opportunities within the division going forward.
- Lead the wealth planning team across the EMEA region, supporting and developing the team as a whole and ensure they are positioned to provide excellent wealth- and succession planning solutions, such as tax, estate planning and structuring.
- Represent the Bank as a Senior Wealth Planner with key clients, external agencies and in a marketing capacity promoting the services and quality of the organisation.
- Work with a group of key clients providing advisory services - assessing their needs and requirements, taking into consideration factors such as liquidity, investment / risk appetite, succession and tax conformity, and proposing suitable solutions.

Requirements

- Approximately 15+ years’ experience as a Wealth Planner with solid experience across the EMEA region both in a leadership and advisory capacity.
- Law or Tax Law Education, or equivalent professional qualifications
- Outstanding communication skills; experience of consulting HNW / UHNW clients
- Awareness of the challenges and opportunities facing Wealth Planners in a Private Banking context and have supported the strategic development of Wealth Planners.
- Fluent English language skills, German, French or other European languages an advantage

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.