

# Opportunity



**Position:** Wealth & Tax Planning Advisor (NRI Clients)

**Location:** Zürich

**Ref:** DA441

For our client, a respected private bank, we are looking for a Wealth & Tax Planning Advisor to join the team here in Zürich. Working within a strong team, you will work closely with Relationship Managers and will focus on the Non Resident Indian clients. If you have a Law degree, strong advisory skills and experience structuring solutions in jurisdictions relevant to this client group then this could be an ideal new opportunity for you.

## Role

Your key responsibilities will include:

- Working with Relationship Managers and Clients structuring innovative financial solutions for clients such as trusts, foundations, collective investment schemes etc.
- Development of new and existing client relationship to acquire assets and increase share of wallet
- Travel with Relationship managers identifying prospects and opportunities to develop strong link between the clients and the bank
- Work collaboratively across the locations to build supportive and professional relationships informing about current issues, challenges and opportunities in the market place
- Support the production of relevant marketing materials and contribute to commentary and documents focussed on the NRI market produced by the organisation

## Requirements

- Law or tax-law degree plus specialist qualifications such as STEP or CFP would be an advantage
- Minimum eight years of experience dealing with private clients and wealth planning
- Self-starter with a methodical approach to your work and able to lead projects working with diverse groups of people
- Knowledge of wealth planning techniques notably considering Cross Border implications
- Trust and structuring vehicles experience and good knowledge of banking products
- 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.