

## **Analyst Intern at Family Investment Partner Team**

6-months Internship - Geneva, Switzerland

Bank Pâris Bertrand SA (PB) is a Swiss private bank founded in early 2009 in Geneva in order to provide banking services and investment solutions to institutional and private clients. The bank counts amongst its client base important family offices and renowned entrepreneurs, who are advised through a dedicated team, Family Investment Partner (FIP).

This is a broad range and challenging role for an intern who wants to have a 6-month experience within a dynamic and solid team. The intern will support the team and RMs on technical and analytical part of FIP business as well as with clients' accounts handling. The goal is to acquire training on various tasks and a good view on private banking activities. The role will require a high level of motivation, some flexibility, high technical financial skills, ability of organization as well as a customer and team spirit orientated attitude.

### **Key Responsibilities**

- Daily management and analysis of proprietary FIP strategies (currently two Equity Strategies)
- Conduct in-depth analysis of underlying stocks, leading the rebalancing process with the structuring banks, enhancing the selection quantitative and qualitative methodology, running some historical analysis on both strategies, adapting and improving marketing material
- Supporting Relationship Manager (RM) in Client's relationship maintenance
- Manage clients liquid and diversified portfolios as well as Private/illiquid and other investments
- Processing tailor-made clients reporting and marketing support (possibility of improving of existing process)
- Participating to Asset Allocation process and funds selection
- Meeting with external asset managers to monitor active funds selected in portfolios
- Running some risk analysis on existing clients' portfolios and mandates
- Supporting RM with investment proposals for new prospects
- Horizontal support of the team (operational, getting to know the client base and use of CRM tool S2i)

### **Candidate Profile**

- University Master degree in Finance or equivalent (CFA, CAIA a plus)
- Good understanding of both corporate finance and financial markets
- Knowledge of the different investment activities of the Bank (Systematic Asset Management and Private Capital)
- Strong attention to detail, quality, and accuracy
- Excellent customer service and communication skills (written and oral)
- Ability to be organized and manage multiple disparate tasks
- Strong entrepreneurial mindset
- A former working experience in the financial / banking field is a plus

**To apply: [careers@parisbertrand.com](mailto:careers@parisbertrand.com)**

*All applications will be dealt with in strict confidence.*