

Private Banking Assistant

Geneva, Switzerland

Banque Pâris Bertrand is a Geneva and Luxembourg based, fast growing Swiss private bank specialized in Ultra High Net Worth clients, family offices and institutional investors.

We are currently looking for a **Private Banking Assistant** who will be in charge of providing support and assistance to a Relationship Manager initially, with scope to supporting 3 RMs (2 Senior and 1 Junior) and providing overall support to the team of Assistants/Relationship Managers of the Bank. The Assistant will deal with UHNW clients and a high level of service and professionalism is required for this post. A minimum of 5-7 years' experience is necessary for this role and the incumbent must be at ease with systems and the technical / operational side of an Assistant role.

Purpose of the role

- Execute front operations (client orders, loans, monitoring deposits, bonds/shares, foreign exchanges, funds, payments, etc). A high volume of operations will take place daily and the incumbent must be at ease operationally. A high degree of rigor is required for this role.
- Manage the processes associated with client transactions including account openings (ensure that documentations are complete and accurate), securities transactions, general account maintenance, customer account changes and account closings.
- Maintain the highest standard of excellence in client service, attending enquiries and requests in a timely fashion and professional manner.
- Manage KYC and ensure that all client-related activities are fully compliant with the processes and procedures related.
- Handle client calls and requests in an autonomous manner.
- Provide administrative and operational support to Private Bankers.
- Apply rules and regulations related to complaints handling, financial crime, cross border activities, investment risk, etc.
- Support and complete various administrative tasks such as tax attestations, coordination of meetings, preparation of business trips, preparation of presentations, correspondence, filing, expense claims, etc.
- Assist other Assistants / RMs whenever needed (back-up). Be team-spirited

Candidate Profile

- Bachelor's degree in business, finance or equivalent.
- Proven experience in a similar role of at least 5-7 years.
- Proven customer service skills, pro-active and flexible attitude, excellent communication skills and ability to multitask.
- High team spirit. Cooperative attitude
- High attention to details and rigor are required for this role.
- IT literate. Excellent knowledge of Excel and Word a must.
- Knowledge of S2i system is a significant plus. Otherwise, being at ease with systems and transactional volume
- Strong understanding of the risk culture and changing regulatory environment. Fair understanding of financial markets and financial services industry.
- Attention to detail, excellent organization skills.
- Spoken and written French (excellent level) and English are a must. Other languages would be a nice plus.

Start date : asap - latest by 01.06.2019

To apply : Karen.kupfer@parisbertrand.com