



# Senior Relationship Manager - UK Clients

Experience level : **Senior**

Entity : **Bank Syz**

Office : **Geneva**

If you are passionate about meeting client needs, want to challenge the status quo and be part of an innovative environment and future, the Syz Group can bring you what you are looking for. Working at Syz takes a blend of collaboration, entrepreneurial spirit and willingness to pull together. In return for your talent and dedication, you can expect a fast-paced, stimulating work environment, a flat hierarchy with direct access to senior leaders, a culture hungry for innovation and the opportunity for your voice to be heard and your ideas to be listened to.

This is an exciting opportunity for you to join the UK, Africa & Asia team within Syz bank. We are actively seeking for exceptionally talented individuals who are collaborative, confident and passionate to provide a first-class experience to clients as we are strengthening and developing our successful UK, Africa & Asia coverage with the appointment of a senior banker in Geneva or Zurich.

## Job summary

The Relationship Manager is the face of Syz Bank's business. The Relationship Manager leads new client acquisition and retention through a broad knowledge of investments, banking, trust services and financial planning. This role is also responsible for the client experience and engaging our resources to deliver a complete wealth management solution.

The potential candidate will be responsible for prospecting and acquiring new HNW & UHNW clients and should have a solid track record of demonstrating both market and product experience with inherent good business development abilities in the target markets with onshore or offshore client relevance.

Knowledge of Swiss banking is an advantage but not a prerequisite, but underlying clients should be open to what Syz Bank can offer from its unique platform and capabilities.

**Location: Geneva or Zürich**

## Key responsibilities

- Prospect and acquire new clients to develop a client book from scratch to best match our clients' product requirements and service needs
- Organize and develop a strong client pipeline, build trust with clients and establish long-term mutually beneficial relationships with them
- Ensure that the proposed products and services maximize the clients' needs, goals and objectives
- Ensure the plausibility and truthfulness of the client information, evaluating whether the client is at risk or not, responsible for the account opening process (identity check, KYC, World check, etc.)
- Keep accurate, up-to-date client investment profiles using internal tools
- Understand our internal product offering to be able to pitch solutions to clients and provide them with investment and management advice, in accordance with the Bank's investment strategy.
- Collect any information that might be useful to develop the relationship with the objective of adjusting the investment profile and/or the client profile periodically and manage successful client retention if needed
- Maintain regular contacts with clients and monitor the existing client situation, inputting any client restrictions in the banking system
- Execute any other duly documented instruction requested by the client
- Ensure that all legal documents are duly signed by the client when the account is opened, during the relationship and that they comply with all regulations, policies and standards, contributing to an effective risk & compliance culture.
- Ensure that the Relationship Manager's level of knowledge relating to its market is up-to-date (market watch - cross-border rules, geopolitical news, product knowledge, etc.)

## Your profile

### Education:

- University degree in Finance or Economics
- CWMA certification would be a strong advantage

### Professional experience:

- Min 8 years' experience as a Relationship Manager covering this specific market.

### Personal Competencies:

- Passionate and committed, with high personal integrity.
- Outstanding interpersonal skills, with capability to establish long-term relationships
- Entrepreneurial, ability to challenge status quo
- Pragmatic, autonomous, discrete

### Language requirements:

Fluency in English and good knowledge of French is a bonus

**IT Skills:** Strong user level in all common IT tools