

Job Description

Junior Relationship Officer

Please answer the following questions with your application:-

- Please confirm you have at least 3 years relationship management skills.
- Please confirm you have been responsible for your own client relationships.
- Please explain why an Investment Consultancy solution is an optimal one?

Job Purpose

To support the client base of the Managing Director and Senior Relationship Manager as well as your own clients.

To ensure smooth and efficient administration of our investment consultancy and performance platform clients. To liaise with investment institutions and clients.

The role will be suited to those with an administrative mindset and investment background.

Principal Functions

◆ Client Support

- Excellent communicator, pro-active and sensitive to client needs
- Nurture and grow relationships with each account
- Support administrative, dealing and valuation needs
- Produce business trip briefing materials
- Assist on client investment, operational enquiries
- Assist with the preparation of quarterly reports for clients

◆ Business Development

- Visit Swiss performance monitoring clients to develop relationships
- Pro-actively communicate to key relationships

◆ Client Reporting

- Produce performance and consultancy quarterly reports

◆ Functional Work

- Maintain and enhance CRM Database
- Collating quarterly valuation reports from investment institutions
- Ensuring accurate and timely input of data into reporting systems
- Production of performance reports

Minimum Requirements

- Mother tongue command of written and spoken English
- Relevant Financial Qualifications
- 3 years investment experience in the Financial Services Industry
- Desired background – Asset / Investment Manager
- Client Relationship Experience
- Investment passion
- Comfortable with boutique style environment

Personal Qualities

- Highly motivated, self-starter
- Strong values of ethics and integrity
- Attention to detail
- Passion to deliver highest quality service

Compensation

Remuneration will comprise of a fixed salary in line with the candidates' experience, an annual performance bonus and long term potential equity acquisition

Application Process

Candidates should provide the following:-

- Copies of all educational and professional qualifications
- References for each position held