
Shaping wealth for generations

For over 200 years, Rothschild's freedom to offer objective advice and our commitment to personal service have combined to shape and grow our private clients' wealth, building value for generations. Our dynamic growth and ambitious targets in relation to quality, innovation and reliability have created a need for the following position:

Junior Investment & Portfolio Advisor

Line Manager	Head of Investment & Portfolio Advisory
Work rate	100%
Target of the role	To strengthen the central Investment & Advisory Team
Main tasks	<ul style="list-style-type: none">▪ Supporting the Investment Advisory and Client Advisors in all aspects related to day to day investment advisory▪ Maintaining databases and improve infrastructure▪ Responsible to support the team with production of portfolio reviews, investment proposals, portfolio & investment monitoring and automated email communications▪ Collation and maintenance of Advisory performance and investment databases. This includes to aggregate client performance, production of portfolio reviews, investment proposals, portfolio & investment monitoring, automated email communications, etc.▪ Preparation of (marketing) materials associated with ad-hoc presentations, such as new client pitches and review presentations to existing clients▪ Maintenance of all standard investment documentation, such as investment mandates and investment guidelines▪ Development marketing material (brochures, presentations, pitch books, etc.)▪ Preparation of regular ad-hoc management reports on investment performance and investment compliance▪ Liaise with relevant departments to review and monitor all standard investment documentation, such as investment mandates and investment guidelines▪ General project work within Investment & Portfolio Advisory

Education/Skills

- University degree in Finance or Business Administration
- Further related education (CFA, CEFA, FRM, PhD) is an advantage
- Affinity for financial markets, investments and trading
- Experience in either portfolio management, investment advisory or research is desired
- Good understanding across asset classes and financial instruments

Experience, qualifications and other requirements specific to the role

- Fully computer literate (MS Office)
- Strong knowhow in VBA
- Fluent in English and German. Any other languages are an asset

Additional skills & Competencies

- Team-player, ethical attitude
- High quality standards with business drive and a “can do” attitude
- Capable of working under pressure and efficiently prioritizing tasks
- Outgoing personality with excellent communication skills

If you are curious to learn more about us and have valuable experiences, then please send your CV with supporting documents and cover letter to Lucie Hinnen, Human Resources (E-mail: lucie.hinnen@rothschildbank.com).