Job Specification

Job Title:	Senior Investment & Portfolio Advisor
Division:	Investments
Full time / Part time:	Full time
Contract type	Permanent
Location:	Zurich

Rothschild & Co

Rothschild & Co is one of the world's largest independent financial advisory groups. We offer a distinct perspective that makes a meaningful difference to our clients' business and wealth.

With a team of 2,800 talented financial services specialists on the ground in 40 countries across the world, we provide independent advice on M&A, strategy and financing, as well as investment and wealth management solutions to large institutions, families, individuals and governments. As a family-controlled business that has been at the centre of the world's financial markets for over 200 years, we can rely on an unrivalled network of specialists and are known for our track-record of outstanding execution in financial services.

Rothschild Private Wealth

At Rothschild Private Wealth we offer an objective long-term perspective on investing, structuring and safeguarding assets, to preserve and grow our clients' wealth.

At Rothschild Private Wealth we provide a comprehensive range of private wealth services to some of the world's wealthiest and most successful families, entrepreneurs, foundations and charities. In an environment where short-term thinking often dominates, our long-term perspective sets us apart. We believe preservation-first is the right approach to managing wealth.

Click here for more information on Rothschild Private Wealth

Overview of Role

To strengthen the central Investment Advisory Team.

Responsibilities

- The candidate should be a senior investment professional with a proven experience in investment advisory or portfolio management coupled with regular client interactions
- Overseeing and managing of advisory client relationships through the front representatives
- Coordination and preparation of regular portfolio reviews and bespoke portfolio proposals
- Idea generation across asset classes including delivery to client advisors
- Supporting client advisors in all aspects related to day to day investment advisory
- Participate to client meetings in-house and outside the bank with client advisors

- Increase advisory penetration within the Bank
- Support and actively contribute in investment meetings
- Active interaction with internal & external specialists in order to derive investment ideas

Education and Qualifications

- University degree in Finance or Business Administration
- Further related education (CFA, CEFA, FRM, PhD) is desired

Experience, Skills and Competencies Required

- Several years of experience in advisory, portfolio management or research in a multi-asset context
- The candidate should be an investment professional with an affinity to multi-asset investment management and client interaction
- Very good generalist knowledge of all asset classes and financials instruments
- Experience in dealing with private clients is desired. The candidate must feel comfortable to adapt his/her communication style to different levels of sophistication
- Fully computer/system literate (MS Office, Bloomberg)
- Fluent in English and German. Any other languages are an asset
- 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