

Job Specification

Job Title: Senior Client Advisor
Division: Private Clients Israel
Full time / Part time: Full time
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 3,400 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

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 above mentioned role.

Click here for more information on [Rothschild Private Wealth](#).

Overview of Role

Create new and develop existing long-term client relationship that add value to the client and lead to expansion of business in Israel.



Responsibilities

- Excellent presentation and communication skills, persuasive personality
- Ability to formulate and execute on a 3-5 year business plan with target AuM's and people
- Target portfolio size 500 million's Euro plus, minimum account size 5 million
- Establish new relationships and manage existing relationship in order to generate new AuM
- Ability to identify, contact and close on portfolios for HNWI in his target market
- Strong networking and facility in contacting HNW and UHNW prospects in Israel
- A passion to perform in a highly motivated team, entrepreneurial spirit is essential
- Ability to properly position and sell the Rothschild brand name
- Ability to provide strong financial and statistical analysis

Experience, Qualifications, Skills and Competencies Required

- Solid business experience of 5 – 10 years in relevant market of Private Banking
- Specialist within high-tech sector and proven network track record within high-tech entrepreneurs
- Extended knowledge of investment issues, markets, economies and house view; continuously improves knowledge of in house products and services
- Experience in structuring and managing portfolios across all asset classes
- Good knowledge of global financial markets
- Understanding of basic concepts of asset allocation, good knowledge of equities, currencies and fixed income markets
- Excellent English speaking skills, German is an asset
- Person of integrity, high sense of responsibility, personal engagement/initiative, pronounced entrepreneurial attitude, seeking continuous improvement
- Creative mind in finding investment solution for clients in challenging market circumstances
- Knowledge of compliance and cross border rules
- Awareness and knowledge of compliance, legal and regulatory practice in the relevant markets
- Awareness of potential risks (internal and external)
- Flexibility, curiosity, 'can do' attitude, high social competence, proactive