

HNW/UHNW Relationship Manager – Canadian clients

Dynamic Tree is an independent investment management firm based near Zurich, Switzerland. We are one of a select group of firms outside of Canada that have full regulatory authority to offer portfolio management and related advisory services to Canadians residing in Ontario, Québec, Alberta and British Columbia. Unlike most firms in Switzerland, which rely on exemptions in Canadian securities law to serve Canadian clients, our registration in Canada allows us to advise both permitted and non-permitted clients and also to advise on Canadian securities. Our specialized platform caters primarily to the wealth management needs of high-net-worth and ultra-high-net-worth clients living in those provinces, but can also accommodate clients based in Switzerland or elsewhere. What sets us apart, however, are the members of our team, all of whom have extensive wealth management experience, a proven track record, and a shared passion for global financial markets.

We are currently seeking candidates who are managing a book consisting primarily of HNW/UHNW Canadian clients and who have an established network of Canadian contacts. This opportunity is ideal for experienced relationship managers with high ethical standards and a desire to operate transparently in today's changing regulatory environment. It is especially suited to those who are looking to move into a more independent and flexible working environment where they will be valued and rewarded as individuals – and given the capacity to operate as such.

The Role:

- Develop and maintain a portfolio of clients through your existing network
- Advise clients on investment strategies and capital markets
- Execute client orders based on a suitability assessment
- Business travel as required
- Meet governance, risk management, controls and compliance requirements
- Competitive compensation

Your Profile:

- Senior relationship manager in private banking
- Strong network in Canada
- Personable and professional manner
- Proven track record in client acquisition and relationship management
- Self-motivated, dynamic personality
- Willing to obtain the Canadian Investment Manager designation (CIM), or already a CFA charterholder
- Fluency in English; German and/or French desirable
- Willing to work in the greater Zurich or Geneva area
- Motivated and driven to succeed, entrepreneurial, able to work both independently and as a successful team player, flexible, with excellent organizational skills
- Courteous but firm character, able to handle problems and conflicts effectively and diplomatically, a creative thinker with excellent listening and communication skills

Interested applicants should send their CV / résumé and a brief covering letter to:
beat.meier@dynamictree.com

All information provided will be treated in the strictest confidence, and will never be shared with a third party without the applicant's prior consent.