

Investment Advisor

Location:	Geneva
Start date	Immediate
Activity rate	100%
Reporting line	Head of Asset Management

About BCP

Established in 1963 as a Swiss Bank, BCP segments its activities into two well-established core businesses: Commodity Trade Finance and Wealth Management. These are reinforced by our expert Treasury services. BCP enjoys a solid reputation as a high-quality service provider in all of its banking fields. Founded under Swiss Banking Law and Regulations, BCP is supervised by FINMA, the Swiss financial markets supervisory authority. Headquartered in Geneva, BCP also operates branches in Luxembourg and in Dubai. More information can be found at <https://www.bcp.bank/en>

About the role

Join a small, dynamic, and entrepreneurial team where your contributions will directly impact the growth of our discretionary and advisory services.

As an Investment Advisor, you'll work closely with Relationship Managers (RMs) to serve an international client base. The Investment Advisor will combine client advisory responsibilities with active involvement in discretionary portfolio management. The Investment Advisor will act as a trusted partners to RMs and clients, delivering high quality investment advice while also contributing to the management of the portfolio management.

In this fast-paced environment, we value curiosity, entrepreneurial mindset, team spirit and the ability to work autonomously while respecting governance frameworks. Your role will be crucial in enhancing client's acquisition and assets growth.

Key responsibilities

- Provide investment advice to private clients across all asset classes.
- Support RMs in portfolio construction, asset allocation and investment proposals as well as in prospecting meetings.
- Monitor clients' portfolios and proactively recommend rebalancing and tactical adjustments.
- Contribute to defining and maintaining the investment universe of the bank across all asset classes.
- Participate in investment meetings within Asset Management division aiming to define the investment strategy of the bank.
- Prepare and present investment ideas, market views and portfolio review to clients.
- Prepare and present weekly markets insights to RMs.
- Contribute to investment publications on annual, weekly and monthly basis.
- Ensure full compliance with regulatory environment, internal policies, and risk management requirements.
- Execution of securities on behalf of clients in global markets when necessary to support the desk.
- Support the continuous improvement of portfolio management processes and tools.

Your profile

- University degree at Masters level in Finance or Economics.
- CFA and/or CAIA desirable.
- Minimum 5 years of experience in a similar position within a Bank, an Asset Manager or a Family Office.
- Proven track of multi-asset portfolios exposure; experience with advisory or discretionary mandates required.
- Knowledge of the Swiss private banking and regulatory environment is compulsory.
- Advance knowledge in pricing, structuring and executing of structured products and derivatives, including options.



- Strong understanding of financial markets, asset allocation, and portfolio construction.
- Excellent presentation and redaction skills in an investment context.
- Ability to listen, guide and advise external and also internal partners.
- Ability to structure data and clearly communicate investment views and recommendations.
- Strong problem solving and analytical skills with attention to details.
- Excellent team player with high spirit of motivation and commitment.
- Ability to question status-quo and deliver fact-based conclusions.
- Strong sense of agility and flexibility.
- High level of rigor, reliability, and risk awareness.
- Strong IT skills, particularly MS Office; Bloomberg knowledge is a must.
- Fluent in both English and French (written and spoken); additional languages are an asset.
- Swiss residency.

What we offer

- A dynamic and multicultural work environment
- An inclusive culture where empowerment and creativity are encouraged
- A competitive compensation package
- Work from home (one day per week).

Application process

Please submit your complete application file via [JobUp](#) or [LinkedIn](#), including your **résumé**.

Response timeframe

If you do not receive a response from us within **three weeks**, please consider that your application was not selected for this position. We appreciate your understanding.

Privacy notice

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