

Job Description

Shaping wealth for generations

Managing and preserving wealth for generations requires thought, care and innovation. We invest time to gain a full understanding of both client's needs and objectives, drawing on our knowledge to project into the future to protect and shape wealth.

For our Zurich office we are looking for a professional with a good knowledge of the Trust business as

Wealth Planner – Russian speaking clients

Description / Job Scope:

The Wealth Planner is able to recommend and guide UHNWI in a comprehensive manner offering solutions such as trusts, foundations, holding structures, companies, insurance, to their wealth structuring needs adapted to their personal and asset related requirements.

This function is expected to support to increase the profile of Rothschild by proactively market and communicate the Rothschild's services to the relevant intermediaries and clients and actively seek opportunities to further develop the business.

The focus will be the interaction with various Russian and non-Russian providers on comprehensive projects.

Summary of duties and responsibilities

- Comprehensive guidance of UHNWI from CIS countries (with the focus on Russia and Ukraine) with consideration to all aspects of wealth planning with the exception of asset allocation and management (focus on international tax planning and use of trusts)
- Close collaboration with clients, their legal and tax advisers and Trust Managers pre- and post-structure set up
- Servicing the existing Rothschild Trust client base by (i) monitoring trends in the wealth planning industry and the respective regions, making sure these are communicated via the Trust Managers and supervising the implementation of necessary changes in order to achieve the long-term goals of the individual/family (incl. supervision of external lawyers); and ii) providing assistance with respect to general trust, tax and legal matters as they arise
- Reviewing/drafting necessary pitch books and client presentations, corresponding legal, contractual trust and other commercial documentation in both English and Russian languages
- Strengthening and/or build up of network of external advisers in different regions, in particular as identified by RT strategy

- Close collaboration with Trust Managers and other Rothschild group employees responsible for private banking and investment banking (Rothschild Bank and Global Financial Advisory) in order to enable them to grow their client base and cross-fertilize Rothschild services
- Training and ongoing education of the above

Qualifications and skills required

- Qualifications:
 - Russian qualified lawyer with three to five years professional experience, preferably in an international law firm or in a financial institution or Family Office. Strong knowledge in the area of Russian corporate and commercial law, tax, private international law and cross-border structuring, inheritance and family law.
 - Good understanding of client mentality and business culture in the respective region
 - Strong ability to make research and comprehensive due diligence of individuals and structures in order to be submitted to client acceptance committee
 - In-depth knowledge and experience of a broad spectrum of financial planning instruments, trusts, private trust companies and foundations would be an advantage
 - STEP accreditation would be an advantage
- Project management skills:
 - Ability to handle complex operational projects across business units to achieve long term goals
 - Ability to manage complex situations and diverging problems facing varying changes and complex interfaces
 - Strong organizational skills, independent working style, flexible
 - Entrepreneurial spirit, taking ownership
 - Capable of problem-solving and acting independently on mandates assigned
 - Ability to prioritize, plan and control activities to achieve goals
- Team player:
 - Has strong influencing skills and displays intercultural awareness when communicating with others
 - Able to lead, develop and train staff members and transmit know-how
 - Demonstrated success in working collaboratively within a team environment

- A focus on customer service excellence is a must; sensitivity and empathy is a prerequisite.
- Fully computer literate (MS Office)
- Native Russian speaking and fluent in English is mandatory. Any other language is an asset.

If you are curious to learn more about us and have a strong background in trusts, knowledge of Russian corporate and tax laws, please send your CV and a sentence or two about why working for Rothschild Trust would appeal to you to Barbara Ursprung, Human Resources (E-mail: barbara.ursprung@rothschildbank.com).