

## **Investment Advisor Beobank - Liège region**

1-09-2022

### **Your mission**

We are looking for an Investment Advisor to act as an intermediary between our customers and our point of sales of Liège. You will provide our clients with financial guidance and make recommendations on how to best utilize their capital. The ideal candidate will be able to identify customer needs, design financial strategies and close a sale with available products & services of Beobank.

You manage and develop a portfolio of investment and savings customers in a proactive way and in collaboration with the point of sales you are working for.

You make every effort to achieve the objectives related to your portfolio.

You will also work closely with the Branch managers, the Premium bankers and the Business bankers of the region.

Your objectives are the production of investments, the transformation of savings to investments, the growth of your investment portfolio, the integration of customers in other product categories.

### **Your main tasks and responsibilities**

Providing strategic advice across a variety of financial products and services

Assessing client's overall financial picture, understand their needs and develop a solid financial plan

Guiding clients towards a profitable and secure financial decision

Cultivate client base and build win-win relationships

Network, generate leads and grab opportunities to sell mutual funds, stocks, bonds etc to meet sales quotas

You are responsible for your portfolio management

You do the follow-up and processing of leads

Comply with the regulations

You try to upstream potential customers to a premium profile and keep the Premium banker informed

You participate actively in investment events

### **Profile**

#### **Requirements**

You have a Master diploma

Proven working experience as a Financial/Investment Advisor or relevant experience

Strong communication, negotiation and presentation skills

You have an appetite for investment and you want to continue to develop your investment knowledge and skills

**You are**

Customer-oriented

Eager to manage proactively and efficiently an important customer portfolio

Convincing in your commercial approach

Result-oriented

Organised and you can work independently

Willing to follow training on wealth and tax structuring

French speaking

➤ **If you are interested, please contact:** [patricia.vanpottelbergh@beobank.be](mailto:patricia.vanpottelbergh@beobank.be)

