



CLARIEN

EVP, Chief Wealth Management Officer

The individual in this role will be a member of the Executive Committee/Leadership team to contribute towards Clarien's overall strategy and to directly formulate and execute on the Clarien and overall Group Wealth Management strategic plan, domestically and globally. The position is responsible for oversight and leadership of Private Banking, Investment Management (Clarien Investments Limited) and Trust Management (Clarien Trust Limited), and all other aspects of wealth management including: leading new business efforts, client acquisition and expanding relationships with key referral partners; maintaining high client service standards; compliance with relevant regulations, and producing high operational and financial results.

Primary Responsibilities:

- Leads growth within Clarien's wealth management business, wealth management products and services.
- Contributes to Clarien's overall business initiatives and strategy and helps elevate the Clarien brand locally and internationally.
- Oversees, plans and directs the activities of the Private Banking, Investment Management and Trust teams.
- Ensures the Wealth Management group has the right employees, with solid employee engagement and ongoing talent management and succession plans as well as effectively recruits to optimize the team and rectify gaps in required skill-sets.
- Leading business development and sales initiatives across the collective wealth management teams, achieving revenue goals, generating leads, managing the sales process through closure, and managing and retaining client relationships in alignment with strategy.
- Overall accountability for the implementation and administration of key strategic initiatives, including expansion into new products and services.
- Full knowledge of relevant compliance requirements and reporting standards and ensures teams adhere to the same.
- Building strong and effective cross-departmental relationships in order to achieve group goals and objectives, including cross-selling targets, efficiency and productivity.
- CFA and STEP or equivalent designations are preferable.
- University degree in business, finance or other relevant field.
- Strategic mindset with a growth and solution-oriented character to work with other stakeholders to deliver a superior client experience.
- Performance driven and proven ability to motivate and drive a business/market development and cross-sell focus across the wealth management organization.
- Significant technical experience in investment management (asset management, brokerage and capital markets) and trust.
- Excellent client relationship management skills.
- Knowledge of wealth management digital channels and the opportunities for technology to help elevate the client experience.
- Ability to demonstrate understanding of economics and financial markets with the ability to explain complex issues to clients, colleagues and the board of directors.
- Strong decision-making skills and ability to adapt to changing priorities and efficiently manage multiple tasks simultaneously.
- Leadership skills; management and training capabilities as well as the ability to optimize employee engagement.
- Excellent communication and presentation skills.

The successful candidate must have:

- Minimum of 10 years' relevant experience, with extensive experience in leading a wealth management function. Preference will be given to an individual with demonstrated success in leading a similar function in the Caribbean.
- Sound working knowledge of Microsoft Office (Word, Excel, PowerPoint), and market data services (Bloomberg, Reuters), and ability to adapt to new technology and software.
- Excellent oral and written communication skills are required.

Clarien is an equal opportunity employer and offers a competitive compensation package commensurate with qualifications and experience.

Please submit a detailed cover letter and résumé no later than February 13th, 2019 to:

Human Resources Department
19 Reid Street, Hamilton HM 11
P.O. Box HM 665, Hamilton HM CX
Email: jobs@clarienbank.com
Fax: + 441 296 7701

www.clarienbank.com | 441 296 6969

Head Office: 19 Reid Street, Hamilton HM11, Bermuda | Paget Plaza: 161 South Road, Paget DV04, Bermuda

We sincerely thank all applicants for their interest. Only those candidates under consideration will be contacted.

Clarien Bank Limited through its wholly owned subsidiary companies is licensed to conduct bank, investments and trust business by the Bermuda Monetary Authority.