

Our client, licensed and supervised by FINMA as a manager of collective assets, is an independent Swiss Asset Manager providing investment management and advisory services to professional clients,

For their headquarters in **Lugano**, we are looking for the following professional profile:

SENIOR SALES & INVESTOR RELATIONS MANAGER

Candidate Profile

Experience

- 8-15 years in institutional asset management sales, investor relations, consultant relations or distribution.
- Swiss or European asset management background.
- Proven institutional capital-raising track record.
- Demonstrated ownership of DDQ, RFP and consultant processes.

Technical knowledge

- Working command of UCITS structures, FinSA, MiFID II and cross-border distribution.
- Familiarity with the Swiss institutional ecosystem: allocators, consultants, private banks, EAMs.
- Sufficient investment literacy to discuss strategy positioning, market context, performance drivers and portfolio attribution with institutional investors.

Personal attributes

- Hands-on builder with the structure and discipline to create the function from a blank page.
- Clear and credible communicator with institutional investors, consultants and internal stakeholders.
- Persistent and disciplined in building relationships, managing follow-ups and moving opportunities forward.
- Comfortable operating with autonomy, limited infrastructure and direct exposure to senior decision-makers.

Languages

- German — mandatory.
- English — mandatory.
- Italian — strong advantage.
- French — useful.

Key Responsibilities

Capital raising and institutional sales

- Develop and execute the capital-raising strategy across Swiss institutional and wholesale channels.
- Contribute to AUM growth across the firm's existing and future strategies.
- Represent the firm at first-level investor discussions and own the process to convert prospects into flows

Platform mechanics

- Onboard, develop and monitor the firm's funds onto Swiss and European distribution platforms.
- Train, monitor and support distribution partners.
- Ensure operational continuity of platform relationships.

Consultant navigation and investor relationships

- Build direct relationships with pension funds via consultants, private banks, multi-family offices and external asset managers.
- Manage the multi-year consultant engagement cycle.
- Maintain a coherent coverage plan for Swiss institutional allocators.

DDQ, ODD factory and investor materials

- Own the production and continuous improvement of DDQs, RFPs and ODD questionnaires.
- Maintain institutional-quality factsheets, pitch decks, attribution reports and investor reporting.
- Ensure factual accuracy and consistency of all external documentation.

CRM and pipeline discipline

- Design and run the CRM and pipeline process.
- Produce management reporting on distribution activity and pipeline progression.
- Ensure follow-up discipline across all investor interactions.

First-level investor engagement and marketing events

- Represent the firm at first-level investor discussions and marketing events.
- Prepare portfolio managers for high-level investment conversations with investors and consultants.
- Frame and coordinate marketing events in line with the firm's positioning.

How to apply

Applications are treated with full discretion. Please send your CV to our dedicated platform. Further information will be given only to applicants in line with the specific search.