



# ISABELLE A. SPECK

ASSISTANT PRIVATE BANKING /  
JUNIOR BUSINESS MANAGER

## CONTACT

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Im Bachofen 3  
8304 Wallisellen

CH-resident, open to move

## SKILLS

- Relationship Management
- Client service excellence
- Communication & networking
- Sales & business development
- Organizational excellence
- Banking operations
- Microsoft office
- Avaloq, Bloomberg

## LANGUAGES

- German (native)
- English (fluent)
- French (fluent)
- Russian (basic)

## PROFILE

Banking professional with nearly 10 years of experience with strong multi-tasking and organizational skills, capable to thrive in high pressure environments, possessing longest and meaningful experience in a capacity of a private banking Account Manager/RM Assistant/Business Head Support.

## WORK EXPERIENCE

- Bank Vontobel** 02/2023 - PRESENT  
Assistant WM & Junior Business Manager CEE
  - Personal Assistant to Business Unit Head
  - deputized RMs (covered books) and colleagues, joined client meetings /visits
  - CRM related tasks (wrote KYCs, handled client reviews, entered mutations, account openings/closings, managed pipeline related tasks, budget planning oversight, unit-wide project support)
  - international event management, specialized in travel & expenses process
  - participated in workshops, supported in implementing new guidelines
  - internal training participation (Mifid/FIDLEG, AML, cross-border, compliance)
  - handled and monitored payments, FX, trades, maturities, fiduciaries, overdrafts, credits
- Client Success Manager** 01/2022 - 01/2023
  - Advisory support for digital affluent client
  - first-line support for app users
  - administrative manager within the Digital Investing department
  - created and improved the client journey
  - outbound calls, hotline agent
  - hand-in hand collaboration with product owners
  - CRM, mutations, data collection
- Assistant WM Nordics (*limited contract*)** 03/2021 - 12/2021
  - on-/ offboarded clients, CRM
  - participated in client meeting, provided administrative support of multiple RMs, executed transactions, monitored transactions, investigated payments, placed stock market orders, checked overdraft, checked maturity products, renewed fiduciary products, supported in investment advisory services
- VP Bank.Vaduz Liechtenstein** 01/2020 - 11/2020  
Client Advisor Assistant Trustees & Lawyers
- UBS AG, Zurich** 09/ 2015 - 12/2019  
Banking Assistant, Corporate Aircraft Financing  
Executive Assistant, Media Relations  
Recruiting Coordinator

## EDUCATION

2023

UNIVERSITY OF BELGRADE /  
RUSSISCH SPRACHSTUDIO

- Russian A1/A2

2021 - 2022

IFFP ZURICH

- Financial consulting

08/2017 - 08/2018

CYP ZURICH

- Banking & financial essentials

01/2015 - 10/2016

KV WINTERTHUR

- Personal Assistant

08/2008 - 07 /2011

KV ST. GALEN

- Kauffrau / commercial apprenticeship

## MISCELLANEOUS

- Karate instructor
- professional bartender
- home-bakery

## REFERENCE

- available upon request

ISABELLE A. SPECK | ASSISTANT PRIVATE BANKING /JUNIOR BUSINESS MANAGER

### HAYS (Schweiz) AG, Zurich

12/2014 - 08/2015

#### Assistant / Receptionist

- Personal Assistant to Branch Manager
- obtainment support for permits of hired contractors
- administrative support of the branch (rental contracts, trips, newsletters)

### CulturalCare , New York, USA

08/2012 / 05/2014

#### Aupair / Nanny

- childcare in a family with 4 children
- kids activities
- household support
- family trip support

### Die Schweizerische Post, Zurich

08/2011 - 08/2012

#### Junior Sales Assistant (1-yr programm)

### Die Schweizerische Post, Zurich

08/2008 - 07/2011

#### Apprenticeship Kauffrau Profil E

year 1+2: 3 days work / 2 days school

year 2: 4 days work /1 day school