

PHILIPPE BOUTRON

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Vontobel

Private Clients Solutions & Distribution

Gotthardstrasse 43, Zurich

Carrières-sous-Poissy, 15 September 2026

Application: Client Portfolio Manager for Discretionary Mandates, Zurich (ref. 9407)

Dear Sir or Madam,

Your advertisement indicates the role of first entry point and expert for the discretionary offering within Private Clients, and of sparring partner for relationship managers on multi asset managed solutions. From 2000 to 2005, at Société Générale Asset Management, I managed balanced discretionary mandates of around €150m for the bank's private clients. From 2011 to 2014, as chief investment officer for the Middle East at SG Private Banking in Dubai, I headed the private bank's investment offering for the region and worked alongside the bankers on asset allocation and portfolio construction for ultra-high-net-worth clients.

It mentions macro views, portfolio positioning and performance development. From 2008 to 2011, as head of investment strategy, I supplied the asset allocation strategy and the investment themes to the advisory teams of a bank of around €90bn in assets, and I managed the strategists and quantitative analysts who produced the market views.

It asks for investment proposals, pitches and client meetings run with relationship managers, also for the French speaking part of Switzerland. In Dubai I led the client investment reviews, supported the bankers in client meetings and prospected with them; revenues grew by about 15% a year over three years. French is my native language.

It requires performance updates for the portfolio managers and the product ownership of special mandates. From 2005 to 2008 I designed the private bank's global investment process and its risk control. From 2015 to 2018, as business product owner of Synoé, the bank's investment advisory service under MiFID II, I defined its allocation framework and its decision rules and launched it; it is still in production.

It expects, finally, an affinity for artificial intelligence and knowledge of programming languages. I use AI tools, agents and RAG daily, and I work with Python and VBA.

Since 2021 I have run Corwyn Conseil, an investment process consultancy. I hold the CEFA (EFFAS, 2002), the European equivalent of the CFA charter, and the CESGA (EFFAS, 2022). I work in French and English. I am an EU citizen, available immediately and free to relocate to Zurich. An assistant I built on Claude answers questions on this application at <https://philippe-boutron-vontobel.vercel.app>.

I would be glad to discuss this with you.

Yours faithfully,

Philippe Boutron