

# Job Title: Client Experience Executive - Goodbody Connect

Department: Wealth Management

Temporary / Permanent: Permanent

Working Style: Hybrid

Location: Dublin

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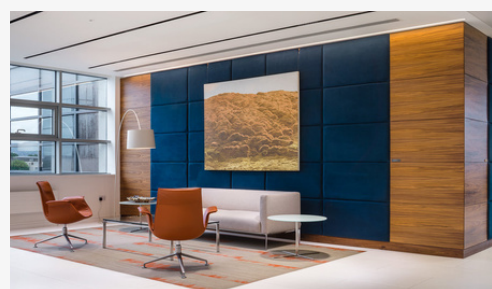


## Role Description

Goodbody Connect is our online, self-directed, share trading platform which caters for our largest customer segment in Goodbody Wealth Management. Goodbody Connect is a home where many customers first experience our brand and what it means to join the Goodbody community. At Goodbody our people differentiate us from our competition daily, and Goodbody Connect provides for an immersive learning environment, allowing Client Success Executives to develop and refine their skills.

## Business Accountabilities

- Managing Client correspondence, Client queries, Client data base amendments and other client related administration while showing a can-do attitude focused on customer excellence and customer experience.
- Developing trusted, collaborative, relationships and delivering high quality bespoke service to clients, across all internal teams and with various third parties.
- Collaborating in client experience and organisational efficiency projects
- Working closely with team members supporting the delivery of an excellent specialist service to Goodbody clients
- Liaising with Clients and their Accountant's in relation to account balances, stock holdings, portfolio valuations, dividend queries and online trading platform access.



Our Headquarters in Ballsbridge, Dublin

## Qualifications

- A minimum of 2 years' Financial Services experience,
- Excellent knowledge of MS Office Suite (Word, Excel and PowerPoint) is essential

## Ideal Characteristics

- Demonstrate customer focused behaviour while using judgement to make sound decisions.
- Strong administrative and organisational skills with a high level of accuracy.
- Ability to work in a dynamic environment and enthusiasm for innovations in digitalisation.
- Have a high level of initiative and determination to help Goodbody Connect develop with its digital strategies.
- Flexible, collaborative, and positive attitude in their approach to work.
- Excellent time management with the ability to work to tight deadlines and handle multiple demands.
- A professional, personable approach to Client needs and expectations.
- A team player but also with the ability to work on own. The initiative to challenge traditional ways of working and actively propose and drive digital change where applicable.

## About the Department

Learn more about Goodbody Wealth Management [here](#)

## How to Apply

Please send your CV and cover letter to [careers@goodbody.ie](mailto:careers@goodbody.ie). Please include responses to the following: (1.) What is your expected salary? (2.) What is your current notice period? (3.) Are you eligible to work in Ireland? (4.) Have you been employed by AIB or any Group Company within the last 2 years? If 'Yes', please confirm your date of leaving.

## About Us:

Goodbody is a leading financial services firm, committed to serving and growing client relationships for nearly 150 years. We are a full service, investment-led business offering wealth management, asset management and investment banking services. Our staff of over 400 work in offices across Dublin, London, Cork and Galway. We're proud to offer prospective employees a professional, collegial work environment that encourages diversity of thought and background. Our reputation in the Irish market for putting customers first is as consistent as the company's long-standing commitment to giving back to the communities that we work in.

## Our Values:

At Goodbody, our purpose is to create long-term prosperity and our vision is to hold leadership positions in the markets we operate in, to drive sustainable returns. To execute on our vision and purpose, we are fuelled by four values: do the right thing, be ambitious, make a difference and work as one.



## What We Offer:

We want all of our employees to feel valued, have work-life balance and be a part of the team for the long-term. We offer regular events focused on wellness, ESG, upskilling and provide plenty of opportunities to socialise, which allows new employees to embrace the firm's culture and creates ongoing engagement for all of our colleagues. We're proud of the benefits we offer, like hybrid working, a generous pension scheme and educational sponsorship, to name a few. Additionally, Goodbody encourages employees to get involved and give back through our [charities and partnerships programming](#).

## Inclusion and Diversity:

Goodbody is committed to Universal Inclusion for all employees – every colleague, every day. We have made a long-term commitment to create a more inclusive and diverse culture and are continually working towards this and finding ways to live that brand promise. We have teamed up with a number of charity and community partners like Dublin PRIDE and See Change, and educational partners like [Forage](#). Other staff-led initiatives include our Student Managed Fund initiative and our female focused [investment club](#). We also rely on a team of employee advocates within the business to further our inclusion and diversity, and wellness initiatives at the company.

**Universal  
Inclusion –  
every day,  
every colleague**



## Sustainability:

We believe that our long-term economic prosperity is increasingly interlinked with environmental and social risks and opportunities. That is why sustainability is a core pillar of our strategy and is implicit in our values. We see sustainability as a driver of innovation and a source of competitive advantage and future revenue growth. Linked to our purpose, we believe that we can contribute to the long-term prosperity of our clients if we anticipate and respond to the risks and opportunities linked to the defining challenges of our time – including climate crisis. Learn more about our approach [here](#).

Goodbody is an equal opportunities employer and is committed to fostering an inclusive workplace which values and benefits from the diversity of our workforce.

Please read the Goodbody Recruitment Privacy Notice. By submitting your personal data to us, you acknowledge that you have read and understood this Privacy Notice and agree to the use of your personal data in line with this. We will only use the information that we collect about you lawfully in accordance with the Data Protection Acts, 1988 and 2003 and the EU General Data Protection Regulation (GDPR).

Goodbody Stockbrokers UC, trading as Goodbody, is regulated by the Central Bank of Ireland. In the UK, Goodbody is also subject to regulation by the Financial Conduct Authority. Goodbody is a member of Euronext Dublin and the London Stock Exchange. Goodbody is a member of the group of companies headed by AIB Group plc.