

## Job description form

Details of the role	
<b>Department</b>	Wealth Management - Goodbody Connect
Job title	Customer Experience - Goodbody Connect
Temporary/Permanent	Permanent
Reporting to	Goodbody Connect Customer Experience -Team Lead
What we are about	
<p>Goodbody Connect is the 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 we believe this segment provides a great opportunity where future wealth managers and customer success executives can develop skills and capabilities very early in their careers.</p>	
Breakdown of the work involved	
Day to day duties	<p>The role will involve providing support to a large client base of Online and Telephone clients' and a team of dealers in the day-to-day management of our Execution client accounts by dealing professionally and promptly with all requests and queries whilst ensuring compliance with regulations.</p> <p>The responsibilities of the role will encompass:</p> <ul style="list-style-type: none"> <li>▪ Duties to include dealing with Client correspondence, Client queries, Client database amendments, Off Market Transfers, Debtors Collections, Cash Transfers and Client File Maintenance while showing a can-do attitude focused on customer excellence and customer experience.</li> <li>▪ Dealing directly with clients and their Accountant's in relation to queries including account balances, stock holdings, portfolio valuations, dividend queries and web access.</li> <li>▪ Taking part in special projects as directed by the Goodbody Connect - Team Lead - actively looking on how to improve the customers digital experience with Goodbody Connect.</li> <li>▪ Developing good working relationships and delivering high quality customer service to clients, across all internal teams and with various third parties.</li> <li>▪ Working closely with team members supporting the delivery of an excellent specialist service to all Goodbody Connect clients.</li> </ul>
Experience required	
Experience required (years)	<ul style="list-style-type: none"> <li>▪ Candidates should have at least two years Financial Services experience.</li> </ul>
Qualifications required	
Specific industry qualifications	<ul style="list-style-type: none"> <li>▪ Excellent knowledge of MS Office (Word, Excel and Powerpoint) is essential.</li> </ul>

Person specification	
Characteristics of the type of person this role may suit	<p>The ideal candidate should possess the following attributes:</p> <ul style="list-style-type: none"> <li>▪ Consistently demonstrate customer focused behaviour while using judgement to make sound dependable decisions.</li> <li>▪ Strong administrative and organisational skills with a high level of accuracy.</li> <li>▪ Ability to work in a dynamic environment and enthusiasm for innovations in digital customer service technology.</li> <li>▪ Have a high level of initiative and determination to help Goodbody Connect develop with its digital strategies.</li> <li>▪ Flexible, positive attitude in their approach to work. Working as a key part of the team in providing support to colleagues and ensuring that the department maintains optimum performance and delivery of objectives.</li> <li>▪ Excellent time management with the ability to work to tight deadlines and handle multiple demands.</li> <li>▪ A professional manner - presentable and personable with a calm demeanour</li> <li>▪ 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.</li> </ul>
Timelines	
How to apply	<ul style="list-style-type: none"> <li>▪ Please send your CV and cover letter to <a href="mailto:careers@goodbody.ie">careers@goodbody.ie</a></li> </ul> <p>Please include responses to the following:            What is your expected salary?            What is your current notice period?            Are you eligible to work in Ireland?            Have you been employed by AIB or any Group Company within the last 2 years? If 'Yes', please confirm your date of leaving AIB Group or any Group Company?</p>

Goodbody has been a strategic advisor to entrepreneurs, families, private and public companies for over 145 years. We are a full service, investment-led business offering wealth management, asset management and investment banking services. How we work is equally important to us. Deeply proud of our heritage and reputation, quality advice and exceptional client service is at the core of our offering. Thanks to the commitment of all our employees Goodbody was recognised as a Great Place to Work. If this sounds like a company you'd like to work with, we'd love to hear from you.

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).

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