

Details of the role	
Department	Wealth Management Department
Team	Advisory Services Team
Job title	Senior Wealth Executive
Temporary/Permanent	Permanent
Reporting to	Senior Director
Purpose of the role?	
	<p>Goodbody is a leading financial services provider with ambition to significantly grow its presence in the wealth management market in Ireland, following its recent acquisition by AIB Group plc. Goodbody has over 330 staff across Dublin, London, Cork and Galway and is proud of its strong diverse culture.</p> <p>Goodbody Wealth provides a full range of advice across investment, wealth and financial planning, portfolio management, treasury management, pensions planning, and active trading. The Advisory Services team has a particular focus on credit union clients. As the largest Advisory Service provider in the Irish market with €4 billion in assets under advice, our focus is to ensure our credit union clients achieve their investment goals, incorporating the highest standards of corporate governance. Beyond credit unions, we serve a range of clients, including trusts, associations and not-for-profit institutions - generally with a fixed-income bias.</p> <p>As an investment advisor we provide our clients with an extremely high level of service. We provide tailored advice on the structure of investment portfolios and the individual investments within it. Services include:</p> <ul style="list-style-type: none"> ▪ Portfolio evaluations including adherence to regulatory requirements. ▪ Investment strategy advice ▪ Written recommendations ensuring a strong audit trail ▪ Ongoing treasury management ▪ Liquidity management and analysis ▪ Income forecasts ▪ Bond execution ▪ CPD training ▪ Access to domestic economic research <p>Our success has been built on providing sound investment advice and putting the customer at the heart of all our decisions. The purpose of the role is to serve our clients with excellence and build on this success.</p>

What does the role entail?

Skills	<p>This is an exciting opportunity for a professional looking to further develop their career and take up a senior position in our high performing team. Acting as a Relationship Manager, this is a client facing role, with direct client, prospect engagement and relationship management. While supported by the whole team, the role will have its own revenue target and make a significant contribution to the team's overall performance.</p> <p>Marketing our offering is a key part of the role, together with the ongoing management of existing clients. The client contact will be via Teams/Zoom but more importantly it will also be face to face. The successful candidate should be willing to travel regularly within Ireland.</p> <p>This role is ideally suited to someone with a keen interest in investments, and a track record of dealing with and presenting to clients.</p> <ul style="list-style-type: none">▪ Very strong interpersonal skills▪ Innovative approach to providing solutions for clients▪ Enthusiastic work attitude▪ Excellent organisational skills▪ Strong attention to detail▪ Excellent communication skills, both written and oral▪ Ability to explain complex investments to a broad audience▪ Ability to work on own initiative and as part of a team▪ Compliance aware and high ethical standards
Specific qualifications	<ul style="list-style-type: none">▪ Registered Representative Examination/Certificate in Stockbroking or be prepared to sit same in a reasonable timeframe.▪ Certified Financial Planning qualification - preferable
Third level	<ul style="list-style-type: none">▪ A Masters / Primary degree or relevant professional qualification.
Experience Required	<ul style="list-style-type: none">▪ A proven track record of winning new clients and providing excellent service to existing clients▪ Established knowledge of financial investments▪ A track record of working with self-initiative and as part of a team

Person specification	
Characteristics of the type of person this role may suit	<p>The successful candidate should ideally have the following attributes:</p> <ul style="list-style-type: none"> ▪ An understanding of credit unions, including their ethos and their financial objectives ▪ The ability to gain the trust and confidence of both clients and colleagues and to have the integrity and frame of mind to develop long-term relationships with a broad range of clients. ▪ Self-starter with energy, ambition, and a desire to progress in a dynamic environment and marketplace. ▪ An excellent knowledge of and a strong interest in investments, financial planning and wealth management. ▪ Strong interpersonal, numerical, presentation and communication skills. ▪ Significant energy and ambition, both for the business and personal development and a proven team player. ▪ Digital literacy including proficiency in MS Office, ZOOM/Teams and platforms such as LinkedIn
Timelines	
How to Apply	<p>Please send your Cover Letter and CV to careers@goodbody.ie</p> <p>Please include responses to the following:</p> <ul style="list-style-type: none"> ▪ 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?

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 in 2018 and 2019. 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).

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. the London Stock Exchange. Goodbody is a member of the group of companies headed by AIB Group plc.