

Details of the role	
Department	Wealth Management
Job title	Wealth Associate - Wealth Management
Temporary/Permanent	Permanent
Reporting to	Head of AIB Goodbody Inside (to be renamed)
Breakdown of the work involved	
Day to day duties	<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. Goodbody Wealth provides a full range of advice on investments, wealth and financial planning, portfolio management, treasury management, pensions planning and active trading. Our clients typically include high-net-worth individuals, corporates and business directors, trusts and not-for-profit organisations. Our services cover a broad range of activities, and our clients are supported by key experts in areas such as pensions, tax, property and investment management. Our success has been built on providing trusted solutions to our clients.</p> <p>This is an exciting opportunity for a professional looking to further develop their career in wealth management and to join the team responsible for delivering a consistent investment, planning and lending service offering to AIB originated clients, using a relationship based approach. The successful candidate will:</p> <ul style="list-style-type: none"> ▪ support the team by being responsible for the client servicing aspects of AIB clients ▪ general administration to include dealing with client correspondence, client queries, client database amendments, off market transfers and cash transfers ▪ deal directly with clients and their accountants in relation to queries including account balances, stock holdings, dividends, historic data requests and web access ▪ ensure compliance with deadlines for management fees etc ▪ work closely with team members supporting the delivery of an excellent specialist service to the department and clients ▪ take part in special projects as directed by team lead ▪ develop good working relationships with internal departments and various third parties ▪ become an account opening "champion" for the team ▪ assist with client digital adoption ▪ proactively react and respond to requests from other departments on behalf of the team ▪ provide cover for placement of client orders ▪ provide support to client events

Qualifications required	
Specific industry qualifications	<ul style="list-style-type: none"> ▪ QFA, CFP or Registered Representative Examination/Certificate in Stockbroking, or be prepared to sit same within a reasonable time frame
Third level	<ul style="list-style-type: none"> ▪ Advanced user of Microsoft office products –Word, PowerPoint & Excel ▪ ECDL qualifications would be an advantage
Experience required	
Experience Required	<ul style="list-style-type: none"> ▪ Financial Services experience would be an advantage
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"> ▪ Excellent client service focus and interpersonal skills ▪ Excellent administrative skills ▪ Excellent time management ▪ Ability to work to tight deadlines and handle multiple demands ▪ Strong organisational skills with a high level of accuracy and attention to detail ▪ A team player but also has the ability to work on own initiative ▪ Ability to work in a dynamic environment ▪ Flexible, positive attitude/approach to work ▪ A professional manner - presentable and personable
Timelines	
Closing date for applications	<p>Wednesday, 10th August 2022 at 5.00pm</p> <p>Please send your Cover Letter and CV to careers@goodbody.ie.</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).

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.