

| Details of the role | |
|--------------------------------|--|
| Department | Wealth Management |
| Job title | Wealth Consultant - 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 be:</p> <ul style="list-style-type: none"> ▪ a client facing executive responsible for the management of the investment and planning needs of AIB originated clients ▪ responsible for building and fostering key relationships with AIB Private Banking relationship managers and staff on client propositions and investment and planning related matters ▪ responsible for supporting the AIB relationship managers and AIB network with Goodbody originated content which will include organising, attending and participating in staff and client events both in person and online ▪ responsible for interacting with AIB on lending related cases ▪ working closely with the Goodbody central investment team to ensure that client accounts are managed in line with client's mandate, objectives, risk profile and timeline ▪ responsible for managing all aspects of the service and support of client related requests originating from AIB clients ▪ responsible for delivering meeting packs, investment updates, attend client meetings and participate in annual client strategic reviews ▪ responsible for assisting in the management of the client transition from AIB Private Banking to Goodbody, encompassing client communications, terms and conditions changes, renewal of information and model portfolio transition |

| | |
|--|--|
| | <ul style="list-style-type: none"> ▪ responsible for supporting the development of team members and the evolution and growth of this new team ▪ responsible for supporting the delivery, education and marketing of Goodbody propositions within AIB and maintaining an excellent working knowledge of AIB Private Banking and Goodbody propositions |
| 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"> ▪ A Masters / Primary degree or relevant professional qualification |
| Experience required | |
| Experience Required (Years) | <ul style="list-style-type: none"> ▪ A minimum of 5 years' experience, with proven track record of working with high-net-worth clients ▪ A proven track record of sales/business development |
| 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 excellent knowledge of and a strong interest in the international investment environment ▪ A certified financial planner [practising financial planner] and a good working knowledge of pensions and pension structures ▪ Self-starter with energy, ambition and a desire to progress in a dynamic environment and marketplace ▪ Experience and interest in lending/banking related propositions ▪ Strong interpersonal, numerical, presentation, management and communication skills ▪ The ability to gain the trust and confidence of both clients and colleagues in Goodbody and across the AIB network, and to have the integrity and frame of mind to develop long-term relationships with a broad range of clients/relationship managers ▪ A proven track record in balancing exceptional client service with challenging targets ▪ Significant energy and ambition, both for business and personal development; and ▪ A proven team player |
| Timelines | |
| Closing date for applications | <p>10 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.