

Job description

Details of the role	
Department	Wealth Management
Job title	Wealth Management Assistant
Temporary/Permanent	Permanent (Full time/Part time hours)
Reporting to	Senior Director
Breakdown of the work involved	
Day to day duties	<p>The role will involve providing support to a team of Wealth Managers and Senior Financial planning manager in the day-to-day management of the Teams client base and assets. The ideal candidate should possess excellent interpersonal skills, strong written and verbal communication and have the ability to multitask while adhering to tight deadlines. The candidate must be a team player with a can-do attitude.</p> <p>The responsibilities of the role will encompass :</p> <ul style="list-style-type: none"> ▪ Assist a team of Wealth Managers in the day-to-day administrative tasks to include dealing with Client Correspondence, Client Queries, Client Database Amendments, KYC Amendments, Cash Transfers and Client File Maintenance. ▪ Ensuring compliance with regulation across all tasks. ▪ Dealing directly with clients and building relationships with them. Placing trades and managing orders where necessary. ▪ Developing good working relationships with Account opening, Pensions Team, Wealth Service Solutions, Investment Solutions and various third parties both internal and external. ▪ Taking responsibility for special and ad-hoc projects for the Team ▪ Online Access Support for clients. An interest and knowledge of IT applications would be a big advantage. ▪ Organising and managing Client Events. ▪ Responsibility for ongoing reporting of Team business and activity through our in-house CRM system. ▪ Responsibility in organising the Teams admin to support the Team's growth and delivery of financial targets.

Qualifications required	
Third level	<ul style="list-style-type: none"> ▪ Ideally the successful candidate should be a Qualified Registered Representative of Irish Stock Exchange (or equivalent). If the successful candidate does not have this qualification, GBS will sponsor the candidate who will be expected to obtain this qualification within an agreed time frame. ▪ Advanced user of Microsoft office products –Word, PowerPoint & Excel.
Experience required	
Experience Required (years)	<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 with 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.
Timeframes	
How to apply	<p>Please send your Cover Letter and CV to careers@goodbody.ie. Please include responses to the following:</p> <ul style="list-style-type: none"> ▪ Are you interested in the full time or part time position? ▪ 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 the answer is Yes, please confirm your date of leaving AIB Group or any Group Company? <p>Closing date for all applications is Wednesday, 26th January 2022.</p>

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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.

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