Job description form

Details of the role	
Department	**Wealth Management - Portfolio**
Job title	Associate Wealth Management
Temporary/Permanent	Permanent
Reporting to	Head of Goodbody Personal

What we are about
Goodbody Personal is an established business area within GWM created to serve and grow Goodbody's emerging customers of tomorrow. We are looking to collaborate internally and externally to provide, the fastest growing market segment in Ireland the most compelling solutions. It is expected that the next decade will create more than all the last century's wealth. We are looking to leverage traditional, digital, and virtual channels to pursue the high growth fast paced opportunities for us and our clients. Targeting a younger demographic is one of the team's core objectives with a view to gaining significant share in this segment and becoming a trusted advisor for the full duration of their wealth journey. This involves a fresh approach to wealth and relationship management. We have ambitious targets and are looking for an ambitious person with the capacity to adapt who wants to take on the challenge of becoming our clients trusted adviser.
Customer
We are targeting a younger segment of the market than we have previously serviced. This cohort is motivated by different ambitions to their parents, both financial and personal. This previously unexplored, and largely neglected segment of the market provides a unique opportunity for innovation within wealth management. It is important that we can listen to and engage that customer base. Curiosity regarding our customers and their ambitions is the core of what we do. Engaging digitally is now core to these clients and we need to be able to communicate and facilitate these clients' needs through digital content and services.
Business
Individuals are required to be highly adaptable in what is a fast-changing environment. It is essential that we can communicate our client solutions with confidence and credibility across a highly diverse client base with differing levels of financial knowledge. This is a high growth segment of the industry and as such stretching targets is a must. The ability to grow and engage a book will be an important attribute.
Career Development
We provide extensive hands-on training from day one and applicants will receive mentoring at all stages in their career development. We believe in a peer to peer coaching culture. Our aim is to support and nurture you on your journey to becoming a top sales professional. This will be complimented by a formal coaching structure that ensures that you are ready to engage with any type of client from diverse sectors, industries, and cultures. The successful candidate will have a defined career path to a Wealth Management Executive role over a period of time.
Why is this of interest to you?

- You are looking to develop and learn in a challenging and competitive environment
- You are a team player and have great communication skills
- You have exceptional organisational and planning skills
- You are independent, self-motivated and can work off your own initiative
- You are results-driven and interested in being part of a fast-paced sales environment
- You have a clear interest in a sales career and going above and beyond to meet client needs
- You have a strong focus on the customer and can easily develop and maintain client relationships.

What will you be doing?

- Help support the team to achieve high quality customer fulfilment
- Support the Wealth Management Executives to achieve ambitious sales targets
- Implement continual improvements to our process for engaging and managing a growing client base
- Support the development of the team in various new products and channels
- Attending client meetings to understand the Goodbody offering and to grow into a trusted adviser role
- Attending workshops to improve your understanding of the product range, improve your technical skills and prepare you for your next role in the company.

Benefits Include

Comprehensive Benefits Package

Experience Required

- Ability to work in a team and contribute to the collective goals and values
- Excellent attention to detail, a willingness to ask questions
- QFA and CFP Qualification or a willingness to undertake these qualifications
- Proven ability to communicate effectively and to resolve issues proactively
- Excellent written and verbal communication skills
- A self-motivated, independent thinker that is focused on developing into an excellent trusted adviser
- Candidate must thrive in a fast-paced, ever-changing environment
- Competitive, collaborative self-starter.