

Job description form

Details of the role	
Department	Wealth Management - Portfolio
Job title	Wealth Management Executive
Temporary/Permanent	Permanent
Reporting to	Head of Goodbody Personal
What we are about	
<p>Goodbody Personal is a new business area within GWM created to serve and grow Goodbody's emerging Wealth and mass affluent customer base, the fastest growing market segment in Ireland. It's expected that the next decade will create more than all of the last century's wealth. This creates a huge high growth opportunity 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 to meet this cohort's financial needs 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 who wants to develop his/her own successful wealth management career.</p>	
Customer	
<ul style="list-style-type: none">As we are targeting a broader segment of the market than we have previously serviced. This cohort is motivated by different ambitions 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	
<ul style="list-style-type: none">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.	
Career Development	
<ul style="list-style-type: none">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.	
Why is this of interest to you?	
<ul style="list-style-type: none">- 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're 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?

- Engage with clients and ensure the suitability of products and portfolios
- A holistic approach to client engagement that includes investments but also broader financial planning
- Help increase sales conversion allowing for higher sales targets and customer fulfilment
- Developing new ideas for identifying potential key customer segments
- Develop process that help reduce the sales cycle time
- Attending workshops to improve your understanding of the product range, improve your technical skills and to prepare you for your next role in the company

Benefits Include

- Comprehensive Benefits Package

Experience Required

- Strong Business Development skills and Sales acumen
- Proven ability to sell suitable and appropriate solutions to clients
- A proven track record of quota achievement and demonstrable career stability
- Achievement of or willingness to undertake the CFP qualification
- Excellent presentation skills to executives & individual contributors
- Excellent written and verbal communication skills
- A self-motivated, independent thinker that can move deals through the selling cycle
- Candidate must thrive in a fast-paced, ever-changing environment
- Competitive, collaborative Self-starter.