

# Job Title: Wealth Management Executive / Relationship Manager

Department: Wealth Management

Temporary / Permanent: Permanent

Reporting to: Head of Goodbody Personal

Working Style: Hybrid working

Location: Dublin

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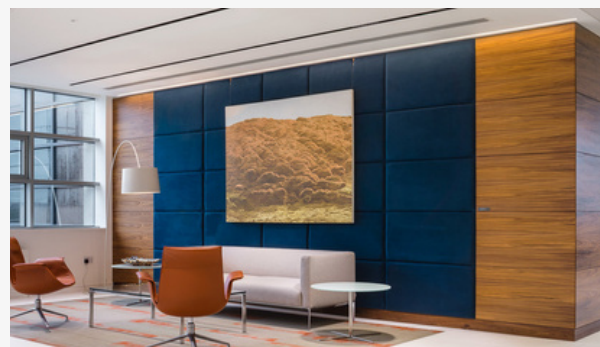
## Role Description

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.

## Business Accountabilities

The successful candidate will:

- Engage with clients and ensure the suitability of products and portfolios.
- Take 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.
- Develop new ideas for identifying potential key customer segments.
- Develop process that help reduce the sales cycle time.
- Attend workshops to improve your understanding of the product range, improve your technical skills and to prepare you for your next role in the company.



Our Headquarters in Ballsbridge, Dublin

## Requirements

- QFA and CFP essential
- Registered Representative Examination/Certificate in Stockbroking desirable or prepared to sit in reasonable timeframe
- Advanced user of Microsoft office products –Word, PowerPoint & Excel
- Relevant 3rd level education advantage.
- Financial Services experience advantage.
- 5+ years private client facing experience essential

## Person specification

- The ideal candidate should possess the following attributes:
- 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.

## How to Apply

Please send your Cover Letter, CV and PR to [careers@goodbody.ie](mailto:careers@goodbody.ie).

## About Us:

Goodbody is a leading financial services firm, committed to serving and growing client relationships for nearly 150 years. We are a full service, investment-led business offering wealth management, asset management and investment banking services. Our staff of over 400 work in offices across Dublin, London, Cork and Galway. We're proud to offer prospective employees a professional, collegial work environment that encourages diversity of thought and background. Our reputation in the Irish market for putting customers first is as consistent as the company's long-standing commitment to giving back to the communities that we work in.

## Our Values:

At Goodbody, our purpose is to create long-term prosperity and our vision is to hold leadership positions in the markets we operate in, to drive sustainable returns. To execute on our vision and purpose, we are fuelled by four values: do the right thing, be ambitious, make a difference and work as one.



## What We Offer:

We want all of our employees to feel valued, have work-life balance and be a part of the team for the long-term. We offer regular events focused on wellness, ESG, upskilling and provide plenty of opportunities to socialise, which allows new employees to embrace the firm's culture and creates ongoing engagement for all of our colleagues. We're proud of the benefits we offer, like hybrid working, a generous pension scheme and educational sponsorship, to name a few. Additionally, Goodbody encourages employees to get involved and give back through our [charities and partnerships programming](#).

## Inclusion and Diversity:

Goodbody is committed to Universal Inclusion for all employees – every colleague, every day. We have made a long-term commitment to create a more inclusive and diverse culture and are continually working towards this and finding ways to live that brand promise. We have teamed up with a number of charity and community partners like Dublin PRIDE and See Change, and educational partners like [Forage](#). Other staff-led initiatives include our Student Managed Fund initiative and our female focused [investment club](#). We also rely on a team of employee advocates within the business to further our inclusion and diversity, and wellness initiatives at the company.

*Universal  
Inclusion –  
every day,  
every colleague*



## Sustainability:

We believe that our long-term economic prosperity is increasingly interlinked with environmental and social risks and opportunities. That is why sustainability is a core pillar of our strategy and is implicit in our values. We see sustainability as a driver of innovation and a source of competitive advantage and future revenue growth. Linked to our purpose, we believe that we can contribute to the long-term prosperity of our clients if we anticipate and respond to the risks and opportunities linked to the defining challenges of our time – including climate crisis. Learn more about our approach [here](#).

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.