Job Description Form

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| Details of the role |
| **Department** | Wealth Management |
| Job title | Associate Wealth Manager |
| Temporary/Permanent | Permanent |
| Reporting to | Team Leader |
| Breakdown of the work involved |
| Day to day duties | The role will involve providing support to a team of Portfolio Managers in the day-to-day management of our discretionary and advisory client accounts. 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. The responsibilities of the role will encompass :* Assist a team of Investment Managers in the day-to-day administrative tasks to include dealing with Client Correspondence, Client Queries, Client Database Amendments, Off Market Transfers, KYC Amendments, Cash Transfers and Client File Maintenance.
* Support the Financial Planning process on the team.
* Ensuring compliance with regulation across all tasks.
* Dealing directly with clients in relation to queries.
* Debtor monitoring and follow up.
* Liaising with Middle Office, Pensions and various third parties.
* Taking part in special projects at the request of members of the team/Client Service Manager.
* Developing good working relationships with internal departments and various third parties.
* Handling Accountant Queries.
* Online Access Support for clients.
* Client Events Support.
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| Qualifications required |
| Third level | * 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.
* ECDL qualifications would be an advantage.
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| Experience required |
| Experience Required (years) | * Candidates should have at least one years' Financial Services experience.
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| Person specification |
| Characteristics of the type of person this role may suit | The ideal candidate should possess the following attributes:* 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.
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| Timelines |
| Closing Date | Closing Date for applications: Friday, 28th June 2019.How to apply: * Please send a copy of your CV and Cover Letter to careers@goodbody.ie
* Please reference Associate Wealth Manager in the subject bar of your email application.
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