Goodbody

# Job description form

| **Details of the role** | |
|---|---|
| **Department** | **Wealth Management - Financial Planning** |
| Job title | Graduate |
| Temporary/Permanent | Temporary (10 week placement) |
| **Breakdown of the work involved** | |
| Day to day duties | This is a varied role which will encompass administration of Goodbody's range of pension and retirement products, sales support to Financial Planning Managers and administration of protection, investment, and pension products with life companies and other third party providers.<br><br>Duties will include helping in the preparation of:<br><br>▪ Client documents<br>▪ Dealing with day-to-day queries from clients, Portfolio Managers, and Financial Planning Managers<br>▪ Administering aspects of pension accounts in a timely, compliant manner.<br>▪ Property Management and application of cash.<br>▪ Ensuring rental income is received and applied and mortgage repayments are paid.<br>▪ Assistance with annual ARF drawdown.<br>▪ Reviewing and processing LPT liability for clients who hold property.<br>▪ Assistance in the preparation of on-going regulatory reporting in relation to Small Self-Administered Pension Schemes and PRSAs including Trustee Annual Reports and Statement of Reasonable Projections.<br>▪ Dealing with insurance companies to retrieve client information.<br>▪ Filing / Scanning / Data entry and maintenance of client records |
| **Experience required** | |
| Specific systems knowledge | **The ideal candidate should possess:**<br>▪ Excellent MS Office skills, including proficiency in Word, Excel, and PowerPoint.<br>▪ Evidence of having successfully worked in a team environment.<br>▪ An interest in and a willingness to undertake further education in financial planning, pensions, and related matters. |
| **Qualifications required** | |
| Specific industry qualifications | ▪ None necessary, but previous experience in a financial/business/banking environment beneficial. |
| Third level | ▪ Business, law/financial or other relevant degree. |

| Person specification | |
|---|---|
| Characteristics of the type of person this role may suit | ▪ Strong communication skills (verbal and written).<br>▪ Strong organisational skills with attention to detail.<br>▪ A team player with a strong appreciation of deadlines.<br>▪ Ability to work on own initiative.<br>▪ A flexible, pro-active approach to work. |

| Additional Information | |
|---|---|
| Additional Information | **Applications are invited from Final Year Students and/or Graduates only.** |
| Reference | Please reference in the subject bar of your email: **Wealth Management - Financial Planning Graduate Opportunities**<br>Please reference if you are eligible to work in Ireland in your application. |

| Timeframes | |
|---|---|
| Closing Date | 12noon Monday, December 31st 2018 |
| Proposed interview dates | January 2019 |
| Proposed Start Date | June 2019 |

*Goodbody Stockbrokers, trading as Goodbody, is regulated by the Central Bank of Ireland. In the UK, Goodbody is authorised and subject to limited regulation by the Financial Conduct Authority.*

*Goodbody is a member firm of the Irish Stock Exchange and the London Stock Exchange. Goodbody Stockbrokers is a member of the FEXCO group of companies.*

*Goodbody is an equal opportunity employer.*