Appendix 1 - Job description form

Details of the role	
Department	**Wealth Management - Portfolio**
Job title	Wealth/Financial Planning Manager
Temporary/Permanent	Permanent
Breakdown of the work involved	
Responsibilities	▪ Grow and strengthen the wealth of high net-worth individuals and their families. ▪ Partner with an experienced team of product specialists and advisors to offer expert guidance on customised solutions to clients and provide them with a professional service for all their investment needs. ▪ Identifying individuals and businesses who may benefit from professional needs analysis for both current and potential clients. ▪ Be involved in shaping the evolution of the business. ▪ Proven ability to generate new business leads from own initiatives/contacts. ▪ Advising on a broad range of wealth, retirement and protection planning strategies. ▪ Implementation of agreed client actions. ▪ Keeping up to date with market developments and ensuring Goodbody is at the forefront of best advice. ▪ On-going client support and relationship management.
Experience required	
Specific systems knowledge	▪ Digital literacy including proficiency in LinkedIn, MS Office including Excel, Word and Powerpoint. ▪ Knowledge of financial needs analysis software and market intelligence software an advantage. ▪ Familiarity with the operational and systems requirements of CPC and other regulatory requirements.
Experience required (years)	▪ At least five years' experience in a financial services client advisory environment. Experience is not confined to Financial services and we will consider candidates with ability to generate business leads and sales in other sectors such as IT and Pharma. ▪ Experience of advising personal and corporate clients in the areas of pensions, retirement planning, estate planning and protection including CAT planning and business protection.

Qualifications required	
Third level & Professional	The successful candidate should have relevant third level and professional qualifications. The following would be particularly suitable: ▪ A third level business, financial or investment qualification. ▪ Qualified Financial Advisor (QFA) ▪ Certified Financial Planner (CFP)
Person specification	
Characteristics of the type of person this role may suit	We are looking for an ambitious, highly motivated individual who can demonstrate: ▪ An entrepreneurial flare to challenge the way things are done and bring a new perspective. ▪ The ability to deliver tangible results through personal application. ▪ The ability to work in and adapt to a quickly changing environment. ▪ The ability to form good working relationships across multi-disciplinary teams. ▪ The ability to generate own pipeline and use own contacts. ▪ Demonstrate high levels of personal initiative. ▪ Financial and digital literacy, strong technical skills and attention to detail. ▪ Strong presentation and communication skills. ▪ Highest professional and ethical standards in advising and executing strategy on behalf of clients.
Timelines	