

Job Description

Title: Wealth Consultant/ Advisor
Location: Dublin, Ireland
Reporting to: Director of Wealth Management (Pensions)
Contract Type: Full time & permanent

Cantor Fitzgerald

Cantor Fitzgerald Ireland is part of leading global financial services firm Cantor Fitzgerald. Cantor Fitzgerald has offices and trading desks in all major financial service centres throughout the world. We specialise in equities, Investment Banking, Real Estate, Fixed Income and Currencies. Cantor Fitzgerald's affiliate businesses include: BGC Group Inc. (BGC), Newmark (NMRK), and GFI Group (GFI). Cantor Fitzgerald Ireland provides a full suite of investment services, primarily wealth management, fund management, debt capital markets and corporate finance. An exciting opportunity has arisen for a Wealth Consultant/Advisor to work with our team in Dublin.

Role Summary:

We are looking to recruit a Wealth Consultant/ Advisor. As a Wealth Consultant/ Advisor, you will collaborate closely with Private Client Advisers to analyse and evaluate scenarios based on clients' needs and objectives, utilising Voyant financial planning software. Your role involves direct communication with clients and external providers to clarify details for financial plans, identify opportunities, and contribute to client meetings through the presentation of Voyant plans. Additionally, you will prepare comprehensive reports outlining wealth and cashflow projections, personal financial goals, and advice to meet clients' objectives. The position requires active involvement in reviewing client plans, adapting to changes in circumstances, and recommending realignment strategies. Furthermore, you will assist in briefing the wider Wealth Management team on legislative and technical changes, ensuring the accuracy of technical information used in client advice.

Responsibilities

- Collaborate closely with Private Client Advisers to construct and assess scenarios using Voyant financial planning software.
- Directly liaise with clients and external providers to clarify details for financial plans.
- Identify and communicate additional opportunities to Private Client Advisers for clients.
- Contribute to client meetings through the presentation of Voyant plans and live scenario builds.
- Prepare reports outlining wealth and cashflow projections, personal financial goals, and advice for clients.
- Contribute to the review of client plans in response to changes, identifying realignment strategies.
- Assist in briefing the wider Wealth Management team on legislative and technical changes.
- Ensure technical information used for client advice is up-to-date and accurate.

- Work closely with existing financial planners to manage priorities and timely delivery of financial plans.
- Build and maintain working relationships with the wider Wealth Management team.

Requirements:

- QFA Certified (at a minimum) or equivalent qualification satisfying the Minimum Competency Requirements of the Central Bank of Ireland.
- CFP part or fully certified (working toward this qualification is an advantage).
- Minimum 3+ years' experience in financial services with a thorough knowledge of financial planning.
- Strong technical knowledge of various financial planning products, services, and strategies, including legislative and tax implications.
- Ability to simplify complex concepts and apply skills and knowledge to achieve objectives.
- Strong numerical ability with high attention to detail.
- Excellent oral and written presentation and communication skills.
- Strong working knowledge of Voyant financial planning software is an advantage.
- Extensive knowledge of products in the Irish market for personal, family, and business protection, as well as pre- and post-retirement planning.

Under The Central Bank of Ireland's (CBI) Individual Accountability Framework (IAF) established under The Central Bank (Individual Accountability Framework) Act 2023 (IAF Act), as a Control Function holder, you have a Duty of Responsibility under the CBI Common Conduct Standards. These standards include:

- acting with honesty and integrity,
- acting with due skill, care and diligence,
- co-operating in good faith and without delay with the Central Bank of Ireland
- acting in the best interest of customers and treating them fairly and professionally
- operating in compliance with standards of market conduct and trading venue rules

This role is a CF-3, CF-4 & CF-5 under the Central Bank's Fitness & Probity standards.

CF-3 - Giving of advice to a customer of the regulated financial service provider

CF-4 - Arranging a financial service for a customer of the regulated financial service provider

CF-5 – Assisting a customer in the making of a claim under a contract of insurance or reinsurance

Qualified applicants may write enclosing their CV to recruitment-ireland@cantor.com, quoting ref: Dublin – Wealth Consultant/Advisor