

## **Job Description**

**Title:** Portfolio Manager

**Location:** Dublin, Ireland

**Reporting to:** Director of Wealth Management – Product Lead

**Contract Type:** Full time & permanent

### **Company Summary:**

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 Portfolio Manager to work within one of our Portfolio Management teams in Dublin.

### **Role Summary:**

The role requires someone who is self-motivated and whose priority is to place the interests of the client always to the fore. Relationship building is critical as this is seen as a corner stone to growing business and the retention of business.

Forging strong relationships with the other teams in Cantor Fitzgerald to help bring the brand to a wider audience.

### **Key responsibilities:**

- Managing the development of long-term client relationships with customers in line with Cantor Fitzgerald Ireland investment strategy and market view.
- Delivery of wealth management advice to existing Cantor Fitzgerald clients focusing on providing solutions in areas such as Protection, Retirement Planning, Wealth transfer.
- Managing all service requirements and subsequent delivery to all private, corporate and intermediary clients under your remit.
- Developing new business opportunities and generating wider revenue streams with existing clients via Cantor Fitzgerald Ireland.
- Managing the cross-selling of product delivery capabilities, including pensions, structured products, life products, Cantor Fitzgerald Ireland equity funds etc.
- Ensuring familiarity with Cantor Compliance and Employee policies and manuals.
- Ensuring adequate competency levels, formal and informal, for services offered or product sold.
- Promoting the good name and standing of Cantor on all occasions
- Participating in all technical and other training courses organised by the Company.
- Participating in ad hoc groups formed to improve company procedures and service standards.
- Assisting in presentations to new business leads and current clients regarding Cantor Fitzgerald Ireland product offerings (Equity, Bonds, Property, EIS, Investment Bonds, Loan Notes etc), investment philosophy and market view.
- Covering for colleagues on annual leave, informing their clients of market movements and news and placing orders on their behalf.

- Creating an annual business plan, including relationship plans for each client, relating to commission and commission growth, fee and fee growth, portfolio performance and funds under management targets.
- Client entertainment – proactive involvement with client base in terms of social events, sporting events etc

### **Skills & Competencies**

- Excellent oral and written communications skills are required
- Attention to detail is exceptionally important for the role
- Ability to show initiative and work within in team
- High level of proficiency in MS Word, Excel, Outlook and PowerPoint
- The ability to liaise with Cantor Fitzgerald's various teams including Retail Stockbroking, Product Development, Corporate Finance, MIM and Marketing, to successfully convert leads into business.
- Meet Central Bank requirements for Minimum Competency and Fitness and Probity

### **Requirements**

- Degree in Business/Finance studies
- Minimum Competency achieved in accordance with MCC Central Bank of Ireland. QFA, Registered Stockbroker, APA (Savings & Investments). This is a Control Function role under the Central Banks Fitness & Probity standards.
- Genuine interest in investment markets

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 and CF-10 designation under the Central Bank's Fitness & Probity standards.**

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

**CF-4** - Provider CF4 Arranging a financial service for a customer of the regulated financial service provider

**CF-10** - Dealing in or having control over property of a customer of the regulated financial service provider

Qualified applicants may write enclosing their CV to [recruitment-ireland@cantor.com](mailto:recruitment-ireland@cantor.com), quoting  
ref: Dublin – Portfolio Manager