

## Job Description

**Title:** Client Relationship Manager

**Location:** Dublin, Ireland

**Reporting to:** Director – L&P Investment Services

**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 Client Relationship Manager to work with our team 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.

### Responsibilities

Reporting to the Director of L&P Investment Services, the employee will be expected to ensure that the client is the focus of our service by:

- Being the main client contact and building a trusting relationship with them
- Understanding their investment requirements
- Proactively engage with clients on a regular basis to provide investment updates, market insights, and portfolio reviews. Anticipate client needs and provide customized solutions to meet their investment objectives.
- Identify opportunities to expand the business relationship with existing clients. Collaborate with the investment managers to generate new leads and convert prospects into clients. Actively participate in client acquisition initiatives.
- Understanding our specific client investment strategy
- Prepare and deliver clear, concise, and compelling investment presentations, reports, and proposals to clients.
- Proactively address client concerns and resolve any issues that may arise promptly. Continuously assess client satisfaction and take necessary actions to enhance client retention rates.
- Ensure all client interactions and investment activities comply with relevant regulatory guidelines and internal policies. Maintain accurate client records and documentation.
- Being capable of:
  - Advising clients on the merits of the investment strategy
  - How the portfolio is constructed to meet their needs

- Outlining the performance of the fund in absolute and relative terms
- Managing with all aspects of the client relationship and communication to all clients
- Managing the work of the support team
- Supporting New Business Leads, as required

**Requirements:**

- Relevant third level qualification
- Must meet MCC requirements of QFA qualification
- Minimum of 5 years relevant experience
- Excellent investment/financial/economic knowledge
- Strong interpersonal skills
- Proven ability to build and maintain strong relationships with high-net-worth individuals and institutional clients.
- Strong numeric and analytical skills
- Computer literate, particularly Microsoft Excel / Word / PowerPoint
- Excellent communication and presentation skills, with a clear need to be able to communicate effectively at all client levels
- Ability to work independently and as part of a wider team
- Familiarity with relevant regulatory frameworks and compliance requirements in the investment industry.
- Demonstrated commitment to ethical conduct and maintaining the highest professional standards.

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** - 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 enclose their CV by clicking the link below

[Client Relationship Manager - Cantor Fitzgerald/BGC Careers \(oraclecloud.com\)](https://oraclecloud.com)