

Job Description

Title: Self-Directed Investment Options (SDIO) Executive

Location: Dublin, Ireland

Reporting to: Head of Client Operations

Contract Type: Full time, Permanent

Cantor Fitzgerald Ireland

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.

Role Summary:

We are seeking a dynamic and detail-oriented professional to join our Self-Directed Investment Options Team. This team supports one of Ireland's largest providers of self-directed pensions, offering a unique opportunity to contribute to a high-performing and client-focused environment.

The role encompasses a wide range of responsibilities, including delivering exceptional service to internal and external clients directly and through their nominated agents.

The ideal candidate will possess excellent analytical and numerical skills, as liquidity and fee calculations are central to this role. You should be comfortable working both independently and as part of a collaborative team.

Responsibilities

- Administer all day-to-day aspects of investment products, including booking, reporting, and closing with third-party providers.
- Serve as the primary liaison with clients and providers, ensuring prompt responses to inquiries.
- Maintain strict service level agreements (SLAs) for both new and existing business processes.
- Process Investment Instruction Forms for structured products efficiently and accurately.
- Calculate liquidity requirements for new and reinvestment cases, ensuring accurate client investments.
- Identify and process encashments, claims, and transfers in line with agreed SLAs and internal policies.
- Accurately classify and assign maturity amounts during high-volume processing periods.
- Ensure timely and accurate fund transfers to providers in accordance with specified guidelines.
- Execute daily, weekly, and monthly reporting as required by business operations.

- Collaborate with internal departments to resolve queries and ensure seamless service delivery.
- Maintain accurate records of all activities, including detailed documentation of client instructions, broker queries, outstanding issues, and executive approvals.
- Adhere to internal policies and controls, including periodic procedure reviews to integrate updates or changes.
- Proactively identify and recommend productivity and quality improvement measures to the Head of Client Operations.
- Innovate and suggest efficient processing methods, while expanding knowledge in new areas for potential future responsibilities.
- Participate in ad hoc projects as needed to support business goals.

Skills & Competencies:

- Strong analytical and numerical abilities.
- Demonstrated understanding of operational risk.
- Effective problem-solving skills with the ability to manage and resolve queries independently.
- Resilience under pressure and the ability to meet tight deadlines while maintaining high standards.
- Exceptional attention to detail.
- Excellent communication skills, both written and verbal.
- Strong teamwork and collaboration skills.
- Flexibility and openness to change.

Requirements:

- A minimum of 2 years' experience in a similar role, ideally within Financial Services.
- A commitment to ongoing professional development, including training and regulatory knowledge.
- QFA certification is an advantage.

Qualified applicants may apply with their CV via the link below:

[Self-Directed Investment Options \(SDIO\) Executive - Cantor Fitzgerald/BGC Careers](#)