

## Job Description

<b>Title:</b>	Paraplanner Specialist
<b>Location:</b>	Dublin, Ireland
<b>Reporting to:</b>	Director of Wealth Management – Pensions and Wealth Planning
<b>Contract Type:</b>	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 Partners, Inc. (BGC), Newmark Knight Frank (KNF), 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 **Paraplanner Specialist** to join our dynamic team in Dublin.

### Role Summary:

The Paraplanner plays a critical support role, working alongside Relationship Managers to deliver high-quality financial planning and advice to clients. 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.

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

### Key Responsibilities:

- Prepare for, assist in, and attend client meetings (as required) to provide technical support and capture detailed meeting notes.
- Build detailed financial plans using our cash flow modelling software (e.g., Voyant).
- Prepare and send client reports following client meetings.
- Conduct research and technical analysis to support client financial strategies.
- Draft suitability reports and advice documentation across pensions, investments, protection, and estate planning.
- Collaborate with Relationship Managers to ensure advice aligns with client objectives and regulatory requirements.
- Maintain accurate and up-to-date client records.

- Stay informed on regulatory changes and industry best practices.

**Personal Attributes:**

- Proactive, collaborative, and highly client-focused.
- Self-motivated with a commitment to delivering exceptional service.
- Excellent interpersonal and communication skills.
- Adaptable and resilient in a fast-paced environment.

**Qualifications:**

- Minimum 2 years' experience in a paraplanning, technical support, or advisory support role.
- This role is scope of Minimum Competency (MCC) so a relevant qualification of QFA (Level 7) is required
- Proficient with financial planning tools such as Voyant.
- Strong technical knowledge across pensions, investments, protection, and estate planning.
- Excellent attention to detail and superior report-writing skills.
- Strong organisational and time management skills with the ability to manage multiple deadlines.

**This role is a CF-3, CF-4, CF-9 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-9** – Insurance and reinsurance intermediaries who direction and manage the undertaking or are directly involved in insurance or reinsurance mediation

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

To apply, qualified Applicants may send their CV via the link below:

[Paraplanner Specialist - Cantor Fitzgerald/BGC Careers](#)