

Job Description

Title: Wealth Advisor

Location: Dublin, Ireland

Reporting to: Director of Wealth Management – Pensions and Wealth Planning

Contract Type: Full-time & permanent

Role Summary:

We are seeking an experienced Wealth Advisor to join our growing team. In this client-focused role, you will work in close collaboration with both Relationship Managers and Paraplanners to design, build, and present personalised financial and wealth plans. A key focus will be your leadership in the creation and delivery of comprehensive wealth plans, using Voyant financial planning software, ensuring each plan aligns with the client's personal goals, values, and financial objectives.

You will actively participate in the financial planning process — from initial client fact-finding and data analysis through to plan creation, strategy development, and clear, confident presentation of financial plans to clients. Your insights and recommendations will help shape the financial advice. Additionally, you will play a critical role in the ongoing review and adjustment of financial plans in response to changing client circumstances, market conditions, or legislation, and contribute to team learning by updating colleagues on relevant technical and regulatory changes.

This role operates under the Central Bank of Ireland's (CBI) Individual Accountability Framework (IAF). As a Control Function holder, you will be subject to the Common Conduct Standards, which include:

- Acting with honesty and integrity
- Acting with due skill, care, and diligence
- Co-operating with the Central Bank of Ireland in good faith and without delay
- Acting in the best interests of clients and treating them fairly and professionally
- Complying with standards of market conduct and trading venue rules

Key Responsibilities:

- Collaborate closely with paraplanners to develop, model, and refine detailed financial and wealth planning scenarios.
- Lead the creation and presentation of personalised wealth plans using Voyant financial planning software.
- Attend and contribute meaningfully to client meetings, providing expert insights, plan walkthroughs, and strategic financial recommendations.
- Ensure financial planning recommendations are tailored, comprehensive, and well-aligned with each client's retirement and wealth accumulation goals.
- Work as a core part of a planning team, coordinating activities between Relationship Managers and Paraplanners to ensure seamless service and timely delivery.
- Continuously monitor and review client plans, proposing adjustments or new strategies as client circumstances evolve.
- Assist in briefing the Wealth Management team on relevant legislative, tax, and regulatory developments that impact client planning.
- Maintain up-to-date and technically accurate planning documentation, projections, and client files.
- Meet or exceed Key Performance Indicators (KPIs), including plan production timelines, client satisfaction, and compliance standards.
- Foster strong cross-functional relationships within the Wealth Management division, supporting a high-performance, client-first culture.

Requirements:

- QFA Certified or equivalent qualification in line with the Central Bank of Ireland's Minimum Competency Requirements.
- CFP fully certified with relevant professional membership.
- Minimum 5 years' experience in financial services, with strong expertise in wealth planning and client-facing advisory roles.
- Deep understanding of retirement planning, including pre- and post-retirement strategies.
- Proven experience using Voyant or equivalent financial planning tools to construct comprehensive wealth models.

- Comfortable working with paraplanners and delegating/supporting technical elements of the financial planning process.
- Excellent communication skills — able to simplify complex financial information and confidently present recommendations to clients.
- High attention to detail and strong numerical reasoning.
- Up-to-date knowledge of the Irish financial services market, investment products, and retirement solutions.

Regulatory Designation:

This role falls under the following Control Function designations under the Central Bank's Fitness & Probity Standards:

- **CF-3:** Giving of advice to clients
- **CF-4:** Arranging financial services
- **CF-9:** Involvement in insurance/reinsurance mediation
- **CF-10:** Control over client property

[Wealth Advisor - Cantor Fitzgerald/BGC Careers](#)