Job Description

Title:	Pension Advisor
Location:	Dublin, Ireland
Reporting to:	Director of Wealth Management- Pensions and Wealth Planning
Contract Type:	Full time & 1 year fixed-term contract

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.

Role Summary:

The Pension Advisor will provide expert technical support and guidance to both clients and colleagues, ensuring full compliance with current legislation and regulatory requirements. This role demands a deep understanding of the Irish regulatory landscape, encompassing all aspects of pension funding, retirement planning, and regulatory reporting, as well as exceptional client engagement and advisory skills. The role will also include oversight of a team through a dotted-line reporting structure, ensuring consistent delivery of high standards, technical accuracy, and regulatory compliance across all pension-related activities.

Key Responsibilities

- Perform complex pension funding calculations and retirement claim assessments (CETs).
- Engage with clients and external advisors on complex technical queries, both pre- and post-retirement.
- Conduct comprehensive financial fact-finds to identify and prioritise client needs and goals.
- Advise clients on retirement options and support them throughout their retirement journey.
- Prepare Statements of Suitability for individual pensions and group corporate schemes.
- Support Cantor relationship managers with technical pension enquiries from existing and prospective clients.
- Drive business development through financial reviews with new and existing clients.
- Maintain and update technical procedures in line with relevant regulatory requirements.
- Review and approve new Cantor pension product applications prior to onboarding.
- Take ownership of allocated work to meet agreed service levels.
- Participate in and deliver internal training to enhance team performance.
- Ensure marketing and product literature remains current and compliant.

- Oversee regulatory reporting for PRSA products, including mandatory ARF/vested PRSA drawdowns.
- Prepare annual PRSA review files and reports for submission to the Pensions Authority.

Education & Qualifications:

- Bachelor’s degree in finance, business, economics or related field is desirable
- QFA Professional certification essential

Skills & Competencies:

- Strong analytical skills and attention to detail
- Excellent interpersonal, communication, and team management skills
- High proficiency in Microsoft Office Suite (Word, Excel, PowerPoint)
- Ability to engage confidently with Compliance, Risk, and Audit functions
- Self-motivated, with the ability to work independently and collaborative

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