

## **Job Description**

**Title:** Administrative assistant

**Location:** Dublin, Ireland

**Reporting to:** Director of Wealth Management

**Contract Type:** Full-time, Permanent

We are seeking an Administrative Assistant to provide administrative, reconciliation, and operational support, with a primary focus on a high-volume and complex client engagement, alongside broader administrative duties across the business as required.

The role will suit someone highly organised and detail-oriented, with strong Excel skills and the ability to manage multiple deadlines. The successful candidate will support financial administration, client onboarding, payment processes, and the effective follow-up of queries while working within a regulated and confidential environment.

## **Key Responsibilities**

### **Dedicated Client & Case Support (Primary Focus)**

- Provide day-to-day administrative support on a significant and complex client matter, ensuring accurate record-keeping and documentation management.
- Assist with financial reconciliations, ensuring consistency across records, statements, and supporting documentation.
- Support payment processing and tracking, maintaining clear and accurate audit trails.
- Maintain and update trackers to monitor progress, deadlines, and outstanding actions.
- Proactively follow up on queries with internal teams and third parties to ensure timely completion of tasks.

## **Client Onboarding & Documentation**

- Support client onboarding activity, ensuring relevant documentation is received, checked for completeness, and recorded in line with internal policies and regulatory requirements.
- Maintain high standards of confidentiality and data protection at all times.

### **General Administrative Support (Secondary Duties)**

- Provide wider administrative support across the business as required, including document preparation and general coordination.
- Manage correspondence by email and phone, responding to queries or directing them appropriately.
- Assist with scheduling meetings, maintaining calendars, and coordinating internal and external communications when needed.
- Ensure adherence to internal policies, procedures, and controls, incorporating updates or changes into daily processes.

### **Skills & Competencies**

- Strong attention to detail and accuracy, particularly when handling financial data.
- Excellent time management and organisational skills, with the ability to balance competing priorities.
- Strong Excel skills, including maintaining spreadsheets, trackers, and basic formulas.
- Clear and professional written and verbal communication skills, with confidence following up on outstanding matters.
- Good numeracy skills and an understanding of payment and reconciliation processes.
- Ability to work independently, demonstrate initiative, and resolve queries effectively.
- Collaborative team player, flexible and adaptable to changing workloads.

### **Requirements**

- Minimum of 2 years' experience in an administrative role, ideally within financial services, legal, professional services, or another regulated environment.
- Experience supporting reconciliations, financial administration, or payment processes is highly desirable.
- Strong working knowledge of Microsoft Excel, Outlook, Word, and PowerPoint.
- Experience supporting client onboarding or document-heavy processes would be an advantage.

[Administrative Assistant - Cantor Fitzgerald/BGC Careers](#)