Job Description

Title: Senior Consultant - Strategy, Finance & Sustainability. Charities and Not-for-Profit Organisations

Reporting to: Director of Stewardship Advisory Services, LPTS

Location: Dublin, Ireland (Hybrid)

International Exposure: The role involves working with charities and not-for-profit organisations across Europe, North America, Africa and Asia.

Role Profile:

This role offers an opportunity for an experienced advisory, finance, data analytics or consulting professional to contribute to the continued growth of L&P Trustee Services, part of Cantor Fitzgerald Ireland. The successful candidate will contribute to delivering high-quality client-facing advisory projects for charities and other not-for-profit organisations, while helping to strengthen the internal tools, processes and capabilities required to scale the department sustainably.

The role requires strong technical capability, practical judgement and confidence across financial analysis, strategic planning, project management, client communication, process improvement and technology-enabled delivery. The successful candidate should be able to contribute meaningfully to client work from an early stage, including financial projections, governance and strategic planning outputs and structured client documentation.

The role is based in Ireland but involves working with clients and stakeholders across international jurisdictions. The successful candidate will be comfortable working with individuals from different cultural, organisational and regulatory contexts and will contribute to projects involving clients in Europe, America, Africa, and Asia. International travel may be required in the future as client engagements and project requirements evolve.

As the department grows, the role will support more efficient ways of working, including improved data collection and analysis, standardised templates, AI-assisted workflows, quality assurance processes and opportunities to automate or streamline recurring activity. Over time, the role may also support the onboarding and development of more junior team members.

Key Responsibilities:

Client Delivery and Advisory Work

- Contribute directly to client projects, including financial and resource projections, strategic planning, governance reviews, sustainability assessments and other advisory engagements.
- Analyse financial, operational, demographic, property and organisational data to support evidence-based recommendations and decision-making.
- Prepare clear client-ready outputs, including reports, presentations, meeting papers, financial models, project plans, risk registers, implementation plans and briefing documents.

- Support preparation for client meetings, workshops, leadership discussions and board or trustee engagements, translating complex information into practical advice.

Data Analytics and Technical Development

- Lead or materially contribute to financial models, long-term projections, scenario analysis, dashboards and analytical tools using Excel, Power BI, Python, R or equivalent platforms where appropriate.
- Improve existing templates, data collection processes, benchmarking tools and reporting formats, support by AI-enabled tools, to improve productivity, research, analysis, documentation, meeting synthesis, quality assurance and client deliverables.
- Identify practical opportunities to automate manual processes, reduce duplication, improve turnaround times and strengthen data governance, confidentiality and professional oversight.

Project Management, Process and Team Development

- Manage defined workstreams within larger advisory projects, including timelines, action tracking, client follow-up, issue logs, data requests and progress reporting.
- Coordinate information from clients and external stakeholders, including leadership teams, finance teams, trustees, professional advisers and international contacts where relevant.
- Document internal workflows, assumptions, methodologies and quality control procedures to support a more scalable operating model and reduce reliance on key individuals.
- Support projects involving international clients and stakeholders across multiple countries, cultures, languages and regulatory environments.
- Participate in client visits, workshops, conferences and project engagements in Ireland and internationally as required.
- Share technical knowledge with colleagues and, as the department expands, support the onboarding, development and mentoring of junior team members.

Key Skills and Competencies:

- Strong analytical and financial modelling capability, including advanced Excel and experience working with projections, scenario analysis or complex datasets.
- Strong data and technology capability, with experience or interest in Power BI, Python, R, automation platforms, AI tools or other relevant systems.
- Excellent written communication, with the ability to produce clear, structured and client-ready reports, presentations, briefing notes and meeting outputs.
- Confident verbal communication and facilitation skills, including the ability to engage professionally with clients and stakeholders from diverse international backgrounds.
- Strong project management discipline, including planning, coordination, documentation, follow-up, version control and the ability to manage multiple priorities.
- Sound judgement, problem-solving ability and attention to detail, particularly when working with financial information, sensitive client contexts and advisory recommendations.

- Ability to apply AI and automation in a practical and responsible way, recognising the need for human oversight, confidentiality, quality assurance and appropriate client tailoring.
- Collaborative and proactive approach, with the maturity to work independently while contributing to shared team capability, processes and standards.

Qualifications and Experience:

- Relevant third-level qualifications in business, finance, accounting, economics, data analytics, mathematics, engineering, management, public policy, law, governance, project management or a related discipline.
- Ideally 4-7 years relevant experience in consultancy, advisory services, finance, audit, data analytics, project management, investment services, charity advisory, governance or a similar professional environment.
- Demonstrable experience in financial modelling, data analysis, business analysis, project delivery, strategic advisory work or client-facing professional services.
- Experience improving processes, workflows, reporting or documentation through automation, AI, data analytics, dashboards, templates or other technology-enabled solutions would be highly desirable.
- Experience working with charities, not-for-profit organisations, religious congregations, public bodies or purpose-led organisations would be advantageous but is not essential.
- Additional language skills would be advantageous, particularly French, Spanish or Portuguese, given the international nature of the client base and project portfolio.
- Experience supporting or managing client-facing projects, preparing reports and recommendations, or mentoring junior colleagues would be helpful.

Person Specification:

The successful candidate will be technically strong, intellectually curious and comfortable working in a growing consultancy department. They will combine analytical rigour with practical judgement and be able to move between detailed technical work and broader strategic thinking.

They should be comfortable taking ownership of defined tasks and workstreams, contributing to improvements in how the service is delivered, and engaging with clients in a professional and thoughtful way. Many assignments involve sensitive issues relating to governance, finance, people, property, mission, legacy and long-term sustainability.

This role would suit someone who has moved beyond an entry-level position and is ready to take on a more substantial advisory role, while helping to build the internal capability, tools and processes required for a growing consultancy department.

[LPTS Senior Consultant - Cantor Fitzgerald/BGC Careers]