

Job Description

Title: Wealth Advisor

Location: Cork, Ireland

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

Contract Type: 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 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:

We are looking to recruit a Wealth Advisor to support the continued growth of our Wealth Management business. The successful candidate will work closely with Relationship Managers to identify opportunities, deepen existing client relationships and assist in the delivery of wealth management solutions across retirement planning, investments, savings and protection. The individual should be comfortable working across both insured and non-insured solutions.

The role will involve direct engagement with clients, participation in client meetings and the preparation of recommendations tailored to clients' objectives. Financial planning tools, including Voyant, will be utilised where appropriate to support advice and illustrate potential outcomes. The successful candidate will also work closely with product providers and internal teams to ensure the efficient implementation of advice and delivery of ongoing service.

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 an expected 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

Responsibilities

- Support the delivery and implementation of a broad range of wealth management solutions across retirement, investment, savings and protection planning, utilising both insured and non-insured structures where appropriate.
 - Build and develop strong relationships with existing and prospective clients.
 - Work alongside Relationship Managers to identify opportunities to broaden client relationships and deliver wealth management solutions.
 - Identify opportunities to deepen client relationships and introduce clients to additional planning, investment, retirement and protection solutions where appropriate.
 - Prepare for and attend client meetings, presenting recommendations and supporting advice delivery.
 - Utilise financial planning tools, including Voyant, where appropriate to support client advice and demonstrate outcomes.
 - Support the ongoing review of client arrangements and identify opportunities arising from changing circumstances, legislation or market developments.
 - Liaise with product providers and internal stakeholders to ensure the timely completion of business.
 - Maintain a thorough understanding of the firm's products, services and investment proposition.
 - Assist in briefing the wider Wealth Management team on relevant legislative and technical developments.
 - Build and maintain effective working relationships across the Wealth Management business.
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- QFA qualified (minimum) or equivalent qualification satisfying the Central Bank of Ireland's Minimum Competency Requirements.
 - CFP qualified or working towards CFP designation is desirable.
 - Minimum 5 years' experience in financial services, wealth management, financial advice or a related client-facing role.
 - Strong understanding of the Irish wealth management market, including retirement planning, investment, savings and protection solutions across both insured and non-insured structures.
 - Comfortable discussing and recommending a range of wealth management strategies and structures as part of a financial planning process.
 - Experience working with life assurance companies, investment managers and other wealth management providers.
 - Commercially minded with an ability to identify and develop client opportunities.
 - Excellent relationship management and interpersonal skills.
 - Experience in financial planning and cashflow modelling, with the ability to translate technical recommendations into clear client outcomes.
 - Strong presentation and communication skills.
 - High attention to detail and organisational ability.
 - Ability to explain complex financial concepts in a clear and straightforward manner.

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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

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