

Biograph .

WEALTH ADVISORS

Client Services Associate – job specification

Biograph Wealth Advisors is a leading wealth management company based in Dublin 2. Our clients are typically high net worth individuals such as business owners, entrepreneurs, medical professionals and some of Ireland's leading sports professionals. Intentionally small, we operate at the forefront of investment theory whilst delivering a best-in class wealth management experience to our clients.

We are currently recruiting for a full-time Client Services Associate to join our expanding team. We are looking for ambitious individuals who are curious, collaborative and want to assist the firm in achieving great outcomes for our clients. Our aim is to empower you, to shape your own career and drive future business success in Biograph.

Activities:

As a Client Services Associate, the role will be varied. You will be working closely with our advisor group and senior leadership team. Your responsibilities will include:

- Assisting the advisor group with the completion of pension, protection & investment reviews for clients.
- Preparing account/ product applications for submission to the relevant provider.
- Liaising with both client & providers/ platforms throughout the new account/ product process through to completion.
- Ongoing client relationship management.
- Assisting the company to meet its regulatory requirements.
- Other duties as assigned

Essential Knowledge & Skills:

- QFA qualified or part-qualified (preferable)
- Excellent writing and communication skills
- Curious and interested in learning
- Strong attention to detail
- Can work unsupervised in your role and be a team player
- You should have confidence to challenge norms and present ideas for change
- Proficient in MS Word, Excel, and Outlook
- Demonstrable experience of effectively managing direct client communications
- Ability to build trusted relationships with clients and provide excellent service

If you would like to have a confidential discussion and find out more, please reach out directly by email to lisadelahunt@biograph.ie

Package:

We offer a very competitive package for the right candidate. The hours are 9am to 5pm (Mon – Fri) at our offices in Dublin 2.

- Competitive salary commensurate with your experience
- Performance related bonus
- Support for further professional development
- Internal and external training
- Personal days
- 22 days annual leave