

Executive Assistant – 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. This is a unique opportunity for the right candidate to join our dynamic team.

Activities:

As an Executive Assistant, the role will be varied. You will be working closely with the Director group who are delivering wealth management solutions to our clients. Your responsibilities will include;

- High-volume email management
- Internal and external client meetings facilitation
- Management of confidential personal and professional calendars
- Gatekeeper duties
- General administration duties (room bookings, filing, photocopying)
- Manage client communications
- Organising client events
- Direct preparation of records such as agendas, notices, minutes, and resolutions for corporate meetings
- Provide coverage to the team where needed.
- CRM management, AML documentation processing, travel co-ordination
- Meeting and greeting clients, and ensuring meeting rooms set-up in advance of meetings
- Co-ordinating staff events, and supporting the organisers with associated logistics and planning

Essential Knowledge & Skills:

- Excellent writing and communication skills
- Strong attention to detail
- The ability to handle sensitive information with discretion, and to always maintain absolute confidentiality
- Experience with Salesforce an advantage
- Can follow up without prompting and keep ahead of arrangements and requirements
- Displays good use of initiative and follow through to completion.
- Self-motivated and possesses a strong aptitude for time management
- Full competency in diary management, can apply good judgment and understands competing priorities
- You should have confidence to challenge norms and present ideas for change
- Proficient in MS Word, Excel, PowerPoint and Outlook
- Demonstrable experience of effectively managing direct client communications
- Ability to build trusted relationships with clients and provide excellent service

Package:

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

- Basic salary of €50,000
- A discretionary performance based annual bonus
- 22 days holiday plus bank holidays and extra company days such as your birthday
- 2 personal days

Biograph .

WEALTH ADVISORS

- Paid study leave and financial support for career-related personal development
- Pension plan with 5% contributions from Biograph Wealth Advisors
- Life Cover and Income Protection
- Based fully onsite in our office in Herbert Street, Dublin 2.

How to Apply:

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