Biograph .

WEALTH ADVISORS

Associate Financial Advisor (professional services entry) – job specification

This is a great opportunity for a recently qualified accountant (ACA or ACCA) or tax professional who wishes to change career into wealth management.

Biograph Wealth Advisors is a leading wealth management company based in Dublin 6. 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.

We are currently recruiting for an Associate Financial Advisor to join our 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 an Associate, the role will be varied. You will be working closely with our advisor group and senior leadership team delivering wealth management solutions to our clients. Your responsibilities will include;

- Manage the setup of client account and policies, liaising with life companies and platform providers as required.
- Providing wealth management advice to the firm's clients
- Work with clients to ascertain their goals and objectives and ensure their financial structure is aligned to achieve these
- Assist in analysing, drafting, editing and delivering comprehensive financial plans to clients
- Assist in analysing prospective client's existing pensions, investments and protection at onboarding stage
- Manage client communications
- Work with client's other professional advisors/ specialists (tax, legal, accounting, corporate finance)
- Attend workshops (internally and externally) and manage your own continuous professional development
- Other duties as assigned

Training provided:

For individuals who are starting their career in wealth management, we have in place a curriculum which will cover all major aspects of wealth management as well as "how to advise the Biograph way". This consists of workshops completed both internally and externally, practical on the job training in our various departments ensuring you have a comprehensive understanding of our processes.

The above will coincide with the completion of both your QFA & CFP exams over a 4 year period.

Along the journey you will also receive professional & personal development guidance from our Director of Talent.

Essential Knowledge & Skills:

- A qualified Accountant/ Tax Adviser (ACA, ACCA, AITI or equivalent) with 3 plus years' experience in a professional services environment
- 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 paddymahony@biograph.ie

Package:

We have a clear career path for Associate Financial Advisors all the way to Partner Advisor.

- Competitive salary commensurate with your existing professional qualifications (ACA, ACCA, AITI or equivalent)
- Performance related bonus
- Study for QFA initially then study for the CFP (over circa 4 years)
- One month paid study leave per annum during training programme
- Internal and external training
- Wellbeing days
- 22 days annual leave
- First class training with our individualised learning & development programme
- Flexible working arrangements