

## Financial Advisor – 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 Financial Advisor to join our Client Advisory 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 Financial Advisor, 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;

- Providing wealth management advice to the firm's clients
- Meeting with new clients and taking them from the initial meeting through the financial planning process
- Work with clients to ascertain their goals and objectives and ensure their financial structure is aligned to achieve these
- Analyse, draft, edit, and deliver comprehensive financial plans to clients
- Analyse 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)
- Undertake annual client reviews
- Attend workshops (internally and externally) and manage your own continuous professional development
- Other duties as assigned

### Essential Knowledge & Skills:

- QFA qualified (minimum)
- CFP qualified (advantageous)
- 3 years plus experience in the industry
- 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](mailto:lisadelahunt@biograph.ie)

# Biograph .

WEALTH ADVISORS

## Package:

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

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