

Job Title: Financial Services Apprentice €20,000-€25,000

Department: Customer Relations, Administration and Assistant to Managing Director throughout the programme

Reports to: Managing Director

Location: Terenure, Dublin 6w

Overall purpose of the role

To acquire the necessary skills, knowledge and capability over the course of three years, enabling the individual to become a CIP qualified, experienced Insurance Practitioner equipped with a Level 8 honours degree. The aim of this programme is to provide a long term career option for the successful individual giving them the practical experience needed while developing a broad financial service education.

Key Responsibilities

- Acquire new skills in all relevant areas such as mortgages, pensions investments and life assurance
- Assist with the processing of client and all documentation
- Follow good practice in ensuring the client's best interests are served when dealing with clients
- Learn the key aspects of the Consumer Protection Code and Central Bank Compliance requirements
- Acquire knowledge on financial services providers and learn about maintaining key relationships with them
- Learn about the relevant product offerings from our providers of Financial Services
- Develop relevant IT skills on the systems used in-house
- Attend the online courses as required and various education days in Dublin or Sligo
- Study to ensure the best chance of success for the educational programme
- Adhere to the Company's compliance as outlined in staff handbook and procedures manual
- Adhere to health & safety policy
- Effective diary management

Person Specification – Our Values

- **Integrity:** Always doing the right thing in a reliable way while honouring the confidentiality of clients. Being open, honest and respectful at all times with our colleagues, with our customers and with all whom we interact.
- **Customer:** We are 100% committed to doing what is right for our customers. We put our customer's wishes at the centre of our operations and thinking to build long-term relationships by delivering on commitments. Our focus is to build trust, loyalty and confidence. We listen carefully to our customer when carrying out a 'needs assessment' to identify the product that is best suited to the customer.
- **Communication:** We believe in open and honest communication using a broad range of communication styles and choosing appropriate, effective ways to communicate to different audiences in diverse situations.
- **Innovation:** Be more creative in our thinking and more effective in our actions to improve processes, methods, systems, or services. We strive to find new and more efficient solutions that serve the needs of all our interdependencies.
- **Learning:** We believe learning is fundamental to our progression and delivery of service. We encourage opportunities where learning and improvement enables talented people to realise their full potential.

About you:

We are looking for an ambitious and talented individual who shows the potential to develop into a high performing commercial business professional. This opportunity is a three year fixed term contract apprentice scheme that provides exposure to all aspects of our business, allowing you to develop your technical expertise as well as professional skills.

Essential Skills and Requirements

- A track record of success and achievement in education, work experiences or extra-curricular activities/volunteering to date. We are looking for a demonstration of where you have taken on extra responsibility, delivered in challenging circumstances and shown your ability to work independently as well as in a team
- Highly effective communication (both in writing and verbally) and organisation skills
- Propensity to learn and apply learning in the work place – to benefit and contribute to the business and to provide assurance about your ability to pass Insurance Institute and degree modules alongside a demanding work programme
- Effective planning and prioritisation skills – balancing multiple deliverables to agreed quality standards
- Critical reasoning and analytical skills
- Excellent numeracy skills
- Attention to detail
- Strong interpersonal and relationship building skills
- Ability to work as part of a team

Application Process

If you think this scheme is for you, please email your CV, proof of qualifications and cover letter to tony@financematters.ie.