



**Job Title: Financial Advisor - LHK Financial**

LHK Financial, Rosemount House, Dundrum Road, County Dublin.

**Company Overview**

We are seeking a highly motivated and experienced Financial Advisor specialising in life and pensions to join our LHK Financial brokerage team.

LHK Financial is part of LHK Group; is a third-generation, practitioner-led general insurance and financial planning broker in Leinster. Established in 1938, we are one of the oldest brokers on the island of Ireland and act as the insurance and financial planning partner of choice for owner-managers, entrepreneurs, sole traders, partnerships, and family businesses across multiple industry sectors, both domestically and internationally. We are committed to providing an inclusive and collegial environment to support our people in the development of a rewarding career in the insurance industry.

**Core Role Objective**

As highly motivated and experienced Financial Advisor, the candidate will be responsible for providing comprehensive financial advice to clients, with a strong focus on Retirement Planning, Investments and all areas of Life, Serious Illness, and Income Protection Insurance. The role involves driving new business development activity from their own and prospect database(s) and developing a robust new prospect pipeline with the aim of developing a substantial book over a 4-5 year period. The successful candidate will service an existing client base in Dublin and the surrounding areas. Administrative support will be available.

**Key Responsibilities**

- Management and maintenance of database and development of pipeline
- Manage and build relationships with an existing client base
- Grow and develop the existing client base through lead generation, referrals and sourcing of new clients
- Conduct regular financial reviews with clients
- Analyse clients' financial goals and recommend appropriate life insurance and pension products. Provide detailed information to clients about product features, benefits and risks.
- Identify and pursue new business opportunities to expand the client base. Achieve agreed annual sales targets. Record all activity on the internal reporting tools and remain disciplined to the sales process.



- Networking – internally with other business units, within the sector, and with external specialists
- Adhere to regulatory requirements in all aspects of day-to-day work and to the business ethics of the company
- Maintain up to date client records and ensure high standard of client files on the dedicated CRM system, BIS
- Adherence to the LHK values and a commitment to maintaining and developing the brand integrity at all times

#### **Necessary Skills / Qualifications**

- Bachelor’s degree in business, finance, or a related field (desirable)
- Industry Specific Qualifications: QFA (essential), RPA (desirable), AIIPM (desirable), CFP (desirable)
- Technical knowledge of all financial products in the marketplace
- Minimum of 5-7 year’s sales experience within the Life and Pensions industry, preferably in a broker environment
- Proven track record of working to and achieving annual sales targets
- Good understanding of relevant regulatory requirements
- Strong interpersonal skills with the ability to build and maintain solid client relationships
- Strong self-awareness and self-presentation
- Professional demeanour
- Proficient IT skills with working knowledge of Microsoft Excel and Word
- Work well under pressure and as part of a financial planning team
- Full driving license and personal vehicle
- Compliant with CPD requirements

#### **Remuneration**

- Salary will be commensurate with experience
- 23 days annual leave
- 10 days paid sick leave
- Bonus and commission structure
- Defined Contributory Pension Scheme

- Death in Service and Income Protection Cover
- Employee Assistance Programme
- Examinations/further study sponsored where relevant to role
- Business expenses
- Laptop and Company mobile phone
- Free parking

*Applications to [careers@lhkgroup.ie](mailto:careers@lhkgroup.ie)*