PeoplesPathHr

#JOB-2459927

THOMOND ASSET MANAGEMENT, 82 O'Connell Street, Limerick, Co. Limerick, V94 AH96

No of positions : 1

Paid Position

40 hours per week

Dependent On Experience

24/07/2026

21/08/2026

How to apply

Application Method :

Please apply to the vacancy by the following means:

Email : peoplespathhr@gmail.com

Open your camera app & point here to view this ad online

Paraplanner

Application Details

In order to work in Ireland a non-EEA National, unless they are exempted, must hold a valid employment permit.Please review the Eligibility and requirements for an employment permit if you are unsure of your eligibility to apply for this vacancy.

Job Description

The Role

The Paraplanner plays a key role in supporting Financial Advisers by providing high-quality technical, research, analytical, and administrative support throughout the financial planning process. The role ensures that client recommendations are accurate, compliant & aligned with regulatory requirements while delivering an exceptional client experience.

The successful candidate must have an in-depth knowledge of the various pension propositions available in Ireland coupled with a deep understanding of the more advanced financial advisory approaches that exploit a wide variety of non-standard product solutions.

The Person

The successful candidate needs to have a strong customer focus with a strong desire to achieve success for your clients. They will need to be a highly organised individual who is efficient & likes to work to specified targets & objectives. They will need to have excellent communication & administrative skills along with strong problem solving abilities. The ability to think laterally is another highly sought trait along with the not accepting the status quo.

Key Responsibilities

Prepare comprehensive financial plans & suitability reports based on adviser recommendations.

Conduct research into financial products, investment solutions, pensions, protection, & retirement planning strategies

Research & compare investment platforms, pension providers, insurance products, & other financial solutions

Stay informed of changes in legislation, taxation, pensions, investments & financial planning regulations

Gather & review client information & documentation

Prepare meeting packs, illustrations, and supporting materials for adviser meetings

Ensure all documentation meets internal compliance standards.

Maintain accurate & complete client records within the CRM system

Liaise with providers regarding product information & applications

Monitor the progress of new business & existing client servicing activities

Experience:

Essential

Experience in a Paraplanning or Financial Planning support role

Strong understanding of financial planning principles

Knowledge of pensions, investments, protection, and retirement planning

Excellent analytical & research skills

High attention to detail & accuracy

Strong written communication & report-writing skills

Excellent organisational & time management skills

Proficiency in Microsoft Office

Experience using financial planning & CRM software

Desirable

Experience within a regulated financial services environment

Knowledge of tax planning & estate planning

Familiarity with cashflow modelling software

Experience with investment research tools & provider platforms.

Qualifications:

Essential

Diploma in Financial Planning (or working towards completion).

Relevant financial services regulatory qualifications applicable to the jurisdiction.

Desirable

Advanced Diploma in Financial Planning.

Chartered Financial Planner status (or working towards).

To Apply please forward CV to peoplespathhr@gmail.com

- **Sector:** financial and insurance activities

Career Level

- Experienced [Non-Managerial]