Job description –

Job title: Canada Life Foundations Advisor

Summary:

Are you ready for your next career move? Are you looking for something meaningful where you can be in control of your hours, your income, your success, and make a real difference in people's lives?

As a Canada Life Foundations Advisor, you'll receive industry-leading training and support to help you build your own business backed by one of Canada's leading financial institutions. You'll find a career with meaning, flexibility, and control where you can make a difference in the lives of everyday people.

We help Canadians plan for life as they know it, and as the last couple of years have shown us, being prepared for life's curveballs is important. In this rewarding career, you'll be helping your clients:

- Plan for the expected; help your clients realize their dreams of home ownership, retirement, children's education, their own business, and more.
- Plan for the unexpected; be it illnesses, job losses, or premature death, we help clients have a risk management plan in place to get them through the unexpected.
- Develop a plan that will evolve with them through life as their needs and situations changes, backed by their trusted, confident relationship in you

What you'll do day-to-day:

- Grow your business by active prospecting in your network and community to individuals and businesses
- Meet with prospects and clients to review their goals and current plan
- Provide comprehensive advice to help your prospects and clients bridge any gaps between their goals and their current plan
- Continually monitor and review your clients plans together to ensure that it meets their changing needs
- Offer trusted solutions to help your clients meet their financial planning needs in the areas of:
  - Life, health and dental, critical illness, and disability insurance
  - Group insurance
  - Investments – segregated funds and mutual funds
  - Mortgage referrals
- Actively seek to grow your business through client introductions

What are the rewards and supports available?

- Support from a training manager to obtain your Life License Qualification and Mutual Fund license
- Industry-leading training and support as you grow your business backed by a trusted brand and financial and business solutions
- Supported income for advisors in the Foundations Program for the first 6 months of your career*
- Dedicated business development advisor to connect you with insurance, wealth-management, and mortgage specialized support, and to support you within a larger team of Canada Life advisors
- Design your business and ideal clientele to reflect your purpose and values

- Continual training and development opportunities from internal and external experts in business development and personal growth
- Support to obtain advanced designations as a Certified Financial Planner (CFP®) or Qualified Associate Financial Planner (QAFP®)
- Supported income during your initial start-up phase, with on-going access to a line of credit as you build your business
- Access to Business Consultants who can help you identify opportunities to partner with other advisors, start your own firm, or purchase a book of business
- Attractive commission structure
- Recognition events and rewards for exceptional business building
- Mentorship opportunities and introductions

Qualifications

You do not need a formal degree or diploma in a related field to pursue the advisor career. Advisors need a passion for helping people and developing strong working relationships. Ideal advisor characteristics:

- Self-motivated
- Entrepreneurial
- Goal-oriented and results-driven
- Caring person who will put their clients' needs first
- Desire to continuously learn
- Demonstrated ability to develop and maintain relationships
- Strong communication skills

Selection process

It's important to us that both you and we feel confident that this is a good fit for your next career move. Our comprehensive selection process includes:

- Consultation with a Consultant, Advisor Talent, or National Recruiting Consultant about the role, opportunities available with firms or financial centres, and your experience
- Online Career Profile assessment to identify your sales personality and suitability for the career
- Market research exercise to confirm your prospecting and networking abilities
- Reference checks from past professional relationships
- Collaborative business plan development with your Business Development Advisor

Career Evolution could include:

- Sub-advisor with an established firm connected to Canada Life
- Firm principal in charge of your own firm
- Sales consultant for specific product areas
- Field leadership roles to develop or attract advisors

Commitment to diversity

We are committed to building an inclusive and diverse industry, representative of all Canadians. We encourage and are pleased to consider how we can support advisors from Indigenous peoples, racialized persons/persons of colour, women, persons with disabilities, LGBTQ+ persons, and others who contribute towards promoting innovative ideas and solutions.

If a career with meaning, flexibility, unlimited potential, constant evolution, and unparalleled support sounds exciting, contact us to learn more and apply.

*To be licensed and contracted as a Financial Security Advisor, you must be a Canadian Citizen or permanent resident. Current immigration rules do not acknowledge the advisor career as valid employment status for permanent residency due to the commission structure.**

*The Canada Life Foundations Advisor role offers a supported income for the first 6 months, following which advisors may be given access to a line of credit option to support their income for the next 18 months, subject to review every 3 months and meeting specific sales and performance metrics.