the co-operators®

A Better Place For You®

Senior Consultant, Individual Life

As the Senior Consultant for Individual Life, you will provide highly advanced education, practice management, tax and estate planning and complex case consultation on Life Insurance and Living Benefits products. You will work closely with Advisors and District Management teams to achieve sales objectives through implementation of solutions for complex needs and offering product expertise for high-end insurance cases and estate planning situations.

What you’re responsible for:

- Participating in the development of advanced sales programs and presentations and working with Advisors to proactively prospect and develop advanced cases within their book of business.
- Developing and maintaining close working relationships with distribution channel partners and providing ongoing sales support to ensure optimum representation of Individual Life and Living Benefit products.
- Providing sales consultation on complex life insurance cases, including conducting case analysis and recommending the appropriate products or solutions.
- Preparing, updating and implementing business plans, developing tactical plans to meet annual growth and retention targets, and contributing to the continuous improvement of processes and procedures.
- Keeping abreast of the competitive market and insurance product features of competitors, including consultation on and awareness of tax and estate planning challenges, industry trends, legislative changes and their impacts.

What to expect:

- You will travel regularly, once COVID restrictions are lifted.
- You are required to have a valid driver’s license and insurance.
- This role involves direct contact with clients and/or service providers.
- Extended work hours, including evenings and weekends, will be required.
- You will be subject to a Criminal Record and Consumer History background check as a condition of employment, in the event you are the successful candidate.

To be successful:

- You remain focused and optimistic in the pursuit of a goal, despite barriers, until the objective is achieved and allocate time and resources to effectively manage the sales portfolio.
- You successfully build plans focused on expanding market penetration and apply an innovative mindset to improve operational efficiencies, with a client centric lens.
- You have strong communication skills to influence or persuade others to adopt a specific course of action and can effectively facilitate mutually beneficial solutions.
- You build trusting relationships and provide guidance to support the development of peers.

To join our team:

- You have minimum 7+ years of progressive experience and knowledge of Individual Life, Living Benefits and/or Estate and Financial planning.
- You have completed post-secondary education in a related discipline.
- You have the Certified Financial Planner (CFP) and/or Chartered Life Underwriter (CLU) designations.
- You hold the Mutual Funds, Life and Accident & Sickness (LLQP) licences.
- You have sales experience in the financial services industry, including familiarity with advisor practice management.

What we offer:

- Training and development opportunities to grow your career with one of Canada's Best Employers.
- Opportunities to give back to your community.
- A competitive compensation package and benefits program.

Search our current job opportunities; https://cooperators.talentnest.com/en/jobs

Each job posting includes a link for applying by location and submitting your resume online.