

Financial Services Specialist job profile

As the Financial Services Specialist with The Co-operators - McNaughton Agency you will focus on developing and deepening client relationships by providing high quality sales and financial services advice. You will be responsible to adhere to regulatory requirements and compliant sales practices and will drive sales growth in investments and life insurance through outbound prospecting and new client acquisitions.

What you're responsible for:

- Contributing to the development and sustainable growth of the agency's investment assets and providing client-centric investment services, including segregated funds and mutual funds solutions.
- Engaging with prospects to proactively build a sales pipeline and developing marketing plans to promote value-added advice-based financial services.
- Conducting needs analyses, reviewing client financial goals, providing recommendations in alignment with Know Your Client requirements, opening new accounts and documenting recommendations or changes.
- Conducting regular reviews of client investment plans and identifying additional asset gathering opportunities.
- Participating in events to create brand awareness and developing, maintaining, and cultivating community contacts to enhance agency visibility and maximize new business opportunities.

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.

To join our team:

- You have three years of experience in the financial services industry, including experience in investment and life product sales.
- You have a post-secondary education in a related discipline.
- You hold a Life License and Mutual Funds License.
- You have or are working towards a Financial Planning designation, such as the Certified Financial Planner (CFP), Chartered Life Underwriter (CLU) or Professional Financial Advisor (PFA) designation(s).

What to expect:

- You are required to have your own vehicle, valid driver's license, and insurance.
- You will travel regularly.
- Extended work hours, including evenings and weekends will be required.
- Strict confidentiality with respect to client's medical history, financial status and other personal information.
- 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.