



As an exclusive **Financial Advisor** of The Co-operators you are an entrepreneurial-minded leader. You are a high achieving business builder who will **manage your own insurance agency with the full support of an established company**. As an **independent contracted Financial Advisor** of The Co-operators, you will build strong, visible ties to the community and will cultivate long-term relationships with your clients. Through use of our exclusive technology, tools and processes, you will help Canadians assess, define and implement solutions to meet their financial security needs.

What you're responsible for:

- Prospecting new clients to openly discuss risk management and financial goals and conducting reviews with clients to empower them to make informed decisions.
- Cultivating strong community relationships to enhance agency visibility and maximize new business opportunities to contribute to sales and growth goals.
- Developing and executing business, operational and marketing plans and supporting sustainability strategies to help Canadian communities become more resilient.
- Recruiting and selecting talent, coaching and mentoring employees, and managing your team's performance to facilitate their development and achieve agency goals.
- Ensuring maintenance of required licences, compliance of ethical behaviour and conformity with corporate policies, industry standards and legal regulations.

What to expect:

- You will be away from the office on a regular basis meeting with clients and/or members of the community in their environment.
- You are required have your own vehicle, valid driver's license and insurance.
- You may provide support to clients who are experiencing a personal or financial loss. A high degree of confidentiality and discretion is 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 facilitate the adoption of change and create a high-performance culture through alignment of your team's work with organizational goals.
- You use critical thinking to guide decision making and apply a strategic mindset to adjust business plans based on shifting priorities.

To join our team:

- You have 3-5 years of management experience in the insurance industry or related business experience.
- You have post-secondary education in a related field.
- You hold a Life licence and a General Insurance licence, with a Mutual Funds licence as an asset.
- You have completed or working toward one of the following professional designations: CFP, CLU, CHFC or accredited Financial Planning Designation.

As a co-operative organization, our business decisions are influenced by our values. We thrive on being open, honest, socially responsible and caring toward others. Working at The Co-operators provides a sense of pride and purpose knowing that we make a difference when Canadians need us most. If you're looking for a diverse workplace culture that encourages continuous development and inspires you to achieve your career potential, then join our team!

Search our current Financial Advisor opportunities: <https://cooperators.talentnest.com/en/jobs>

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