

# LIFE INSURANCE AND FINANCIAL PLANNING SUPPORT REPRESENTATIVE



**Independent Accountants' Life Insurance Agency Inc. (IALIA)** [www.ialia.ca](http://www.ialia.ca) is a life insurance services company with offices in Waterloo and Listowel, Ontario. As part of the Independent Accountants' Financial Group ([www.iafgfirms.ca](http://www.iafgfirms.ca)), IALIA is affiliated with the **Independent Accountants' Investment Council Inc. (IAIC)** [www.iaic.ca](http://www.iaic.ca) which currently manages more than \$2 billion in private client assets. IAIC provides discretionary investment management and financial planning services for private clients, corporations, estates, foundations, and individual pension plans.

IALIA works with clients of the IAFG member firms to assist in their life insurance needs. The goal is to provide independent advice that integrates with each client's unique accounting, investment management and financial planning needs.

We are currently recruiting for a **Life Insurance and Financial Planning Support Representative** in our Waterloo office with the flexibility of working from home at times.

## **Duties and Responsibilities:**

- Life Insurance Support:
  - Completing insurance analysis spreadsheets
  - Application administration
  - Report production
  - Providing other administrative duties
- Financial Planning Support:
  - Assist in tracking/coordinating financial planning caseload
  - Providing support including but not limited to preparing and creating reports, creation of templates, financial planning data input etc.
  - Act as a primary liaison between Financial Planning and IALIA
- Other duties, as assigned.

## **The successful candidate will have:**

- Post-secondary education preferably in accounting or financial planning
- Certified Financial Planning designation (or willingness to obtain) preferred
- Life Licensed (or willingness to obtain) preferred
- Previous experience working in the life insurance industry preferred
- Ability to work independently and collaboratively
- Excellent time management, problem solving, communication (oral, written, and interpersonal) skills
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook
- Experience using NaviPlan financial software is an asset.

If you are interested in a position with a successful and growing organization, please submit your resume and cover letter in confidence by noon on **April 21, 2021** via e-mail to:

Ward & Uptigrove Human Resources Solutions

**Attention: Tonya Wilson**

E-mail: [HRresults@w-u.on.ca](mailto:HRresults@w-u.on.ca)

*We are committed to providing a barrier free workplace. If accommodation is required during the selection or interview process, it will be available upon request. This job posting is available in an accessible format upon request.*

*We thank all candidates for their interest; however only those candidates selected for further screening will be contacted. No phone calls please.*