Associate Financial Advisor
Location: Stouffville, Ontario
Employment Category: Permanent Full-Time

Our Distribution team aspires to be the leader in client engagement among Canadian Insurers. We strive to provide a seamless and personalized client experience. Our knowledgeable and trusted team is committed to delivering financial services solutions to meet our clients' unique needs. The Associate Financial Advisor plays a key role in supporting and developing agency operations through outbound prospecting, client contact and sales activities. This role may have an opportunity to specialize in one or more product areas such as life, group and wealth. The Associate Financial Advisor will identify prospects in both personal and business markets, determine needs and as a trusted Associate Advisor, make informed product recommendations. They may also be involved in the development and growth of personal lines products (home/auto insurance) and specialty lines (farm and/or commercial) portfolios.

What you're responsible for:

- Support development of the agency operation through the sales and profitable growth of life, group and wealth management products.
- Service and support the life, group and wealth management portfolio of the agency while adhering to compliance rules and regulations for the sale of life insurance and wealth management products.
- Proactively complete client reviews focusing on life and wealth management products.
- Prospect and cross sell all lines of business by completing needs analysis for clients in accordance with the agency Business Plan.
- Complete front-line risk assessment and selection, following underwriting guidelines.
- Complete home, commercial and farm inspections as required.
- Develop annual marketing plans outlining strategies and activities to meet goals in each product area of responsibility.
- Respond to and investigate client questions and concerns, resolve client complaints and escalate issues appropriately.

What to expect:

- You will travel occasionally.
- You are required to have a valid driver’s license and insurance.
- Strict confidentiality with respect to client’s medical history, financial status and other personal information.
- Extended work hours, including weekends, may be required during peak periods.
- This role involves direct contact with clients and/or service providers in their environment.
- 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:

- Life License is required.
- General or other Insurance License(s) may be required depending on the specialty focus for the role.

- Meet all provincial-licensing requirements in accordance with continuing education in order to obtain and maintain all licenses.
- A minimum of two (2) years sales experience or related business or marketing experience is preferred.
- Knowledge of insurance products and strong underwriting skills is an asset.

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.

Please send your resume to:

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