<u>Job Posting</u> – Administrative Sales Associate

Job description

We are seeking a full-time Administrative Sales Associate for a third-generation family run business, providing client solutions within the *insurance* and *investments* services industry, in the Caledon area. This position requires a forward-thinking, energetic, ambitious, and hard-working professional who puts client's needs above all else. The successful candidate must have a positive attitude, meticulous attention to detail, superior interpersonal skills, and a team-player mentality.

Who you are:

- Client-centered, always putting client interests first
- Entrepreneurial
- Curious and willing to dig deep to find solutions to complex problems
- Able to build strong, lasting relationships with clients
- Able to work independently and in a team
- Willing to be flexible, occasionally working long hours

Qualifications:

- Mutual Fund License required
- Insurance License required
- Minimum of 3 years of experience in the Investment/Insurance/Financial Services industry in an advice-giving capacity
- Basic to in-depth understanding of financial products & markets
- Experience using Microsoft Office suite (especially Excel) and including Dynamics

What you will do:

- Prepare documentation (including applications, transfer forms, reports, correspondence and summaries) and follow-up on any outstanding requirements for all lines of business
- Work closely with the Advisor to manage segregated fund and mutual fund investment portfolios
- Deal directly with clients, attend select client meetings, and present investment/insurance ideas
- Analyze the portfolios and insurance programs of prospective, new, and existing clients
- Prepare proposals and client review presentations
- Build, monitor and rebalance customized portfolios in accordance with the client's profile and compliance requirements
- Conduct research and analysis to help with insurance/investment selection and asset mix decisions
- Perform due diligence on mutual funds, and other investments as required
- and analysis in the preparation of Financial Plans using Naviplan software
- Provide high quality client service, including phone, email, written and in-person communication
- Coordinate with the team to ensure that client portfolios are consistent and aligned with the clients' financial plans
- Liaise with external service providers in the planning process
- Maintain high standards of ethics, integrity, objectivity, and expertise

If you are interested, please submit your resume and cover letter directly through this job posting.

If you require accommodation for the application or interview process, please let us know, and we will work with you to meet your needs. While we thank all applicants for their interest, please note that only those individuals selected for an interview will be contacted.