Job Details

Description

Wealth Protection Specialist

Thrive Wealth Strategies

Thrive Wealth Strategies is a wealth management firm serving members of credit unions and their communities. Financial advice and planning are core to what we provide for clients, including investment advice, retirement savings, income planning, estate, and protection advice. Our employees are team-oriented individuals and support a relationship-based environment. [Learn more about our diverse team across Saskatchewan].

The bigger picture:

We're looking for a Wealth Protection Specialist to join our Thrive Wealth Strategies team. If you are a self-starter who is outgoing and passionate about providing needs based advice around personal and business protection strategies, then apply for this role today.

How you'll spend your time:

- Provide expert advice and custom-made insurance strategies to members/clients to meet their needs
- Develop business through your centers of influence and referral relationships
- Provide advice for succession strategies for business members/clients
- Proactively identify opportunities to make referrals to experts on our team

The way people describe you

- A self-motivated individual who has a strong understanding in insurance analysis and planning
- An individual who acts with professionalism and integrity
- You take pride in doing what is right for your clients
- An effective networker who actively seeks new client relationships and opportunities
- A team-oriented individual who support a relationship based environment

The experience you bring:

- 3 years' experience in an insurance advisory or financial services role
- A proven track record of delivering sales results
- Level II Life License
- Financial planning designations (CFP®/PFP®/CIM®) are considered an asset

While various Saskatchewan locations may be considered, not all locations may be possible to accommodate this position.

What you get in return:

- **Compensation**– Competitive commission model and total rewards package.
- **Work/Life Fit**– You won't be chained to your desk, we trust you to manage your own day-to-day schedule. In addition to regular vacation time, we offer Thrive-Time (10 days per year), which allows you to disconnect from work for smaller periods throughout the year.
- **Wellness & Benefits**– Your choice of flexible or comprehensive package. Annual $200 towards wellness activities per year.
- **Pension**– 7% matching to our CSS Pension Plan
- **Learning & Development (L&D)**– We want to see you succeed and build your career! Annual training/education related to your learning & development plan will be supported through covering costs and paid time off. We also offer a variety of networking and mentorship opportunities.
- **Credit Union Network**- We are the wealth management company of our credit union owners, which means we have the exciting opportunity to partner with our credit unions to offer wealth management to credit union members.
- **Operational Costs**- Thrive covers the operational cost (computers, office space/supplies, CRMs, etc.) of doing business so our team can focus on building relationships with clients and help them reach their wealth goals.

Does this sound like you? Please apply through our website. But act fast, this opportunity closes on July 31, 2021. All responses are appreciated, however only those invited for an interview will be contacted.

Looking for more details? Contact Heather at heather.howland@thrivewealth.ca

Thrive Wealth Strategies Ltd. is a subsidiary of Thrive Wealth Management Ltd., offering financial planning, life insurance and investments to members of credit unions and their communities.