Insurance Assistant – Vancouver

WHO WE ARE

Odlum Brown Financial Services Limited is a wholly owned subsidiary of Odlum Brown Limited (Odlum Brown) that provides financial planning, retirement, tax and estate planning, and insurance products exclusively to Odlum Brown clients.

Anchored in our purpose to help clients achieve their financial goals, Odlum Brown has remained an independent, full-service investment firm for over 100 years. Wholly owned by its team members, the firm continues its tradition of leadership in the financial community as one of BC's most respected investment firms.

We are honoured to be nationally recognized as one of Canada's Best Managed Companies and one of Canada's Most Admired™ Corporate Cultures, and to share the achievement of a century in business with our valued team members, clients and communities.

CULTURE AND VALUES

Guided by a set of timeless core values – Clients First, People, Accountability, Independence, Integrity and Community – we are very proud of the vibrant, ever-evolving culture that we have built over the years. These values are the cornerstone of our culture and the principles that provide a compass for our actions and unify us as a team.

PEOPLE

We have skiers, mountain bikers, hockey players, runners, volleyball players, movie buffs, bookworms, animal lovers, musicians, yogis, world travelers – all with diverse backgrounds and experiences to share from around the globe. You will work with really interesting people and make great friends, too.

COMMUNITY

We are serious about supporting the communities where we live and work. A recipient of a Canada's Volunteer Award from the Government of Canada, we are committed in heart and mind to everything we do in the community, and we work hard to inspire passion and fun while doing it.

PROFESSIONAL DEVELOPMENT

Continuous learning matters. We are committed to providing career-long support for learning and growth.

THE OPPORTUNITY

We have an opportunity for a licensed Insurance Assistant to join our award-winning firm in the Vancouver office.

WHAT YOU'LL DO

Reporting to the Vice President, Financial Services, you will work in a team environment to serve our clients in the areas of insurance and financial planning. You will be responsible for providing information to Investment Advisors and their clients on a variety of insurance-related topics and demonstrate an ability to match appropriate insurance solutions and products to client needs.

As a licensed Insurance Assistant, you are able to communicate and provide insurance support to our in-house insurance professionals, Investment Advisors, Portfolio Managers and investment clients. You are experienced and proficient with current insurance industry trends, products and regulatory requirements and are well versed in navigating insurance underwriting.

RESPONSIBILITIES

- Provide insurance services to a wide range of internal and external clients
- Support insurance professionals in day-to-day insurance activities
- Manage insurance professionals' calendars for appointments with internal and external clients
- Complete insurance applications with clients and advise on required next steps
- Process new business applications, maintain files and monitor progress with clients and insurers
- Respond to inquiries from clients and Investment Advisors and Portfolio Managers
- Provide client service for existing insurance clients

PROFESSIONAL QUALIFICATIONS AND EXPERIENCE

- Life and Accident and Sickness licensed with a minimum 3 years' post-licensing industry experience required
- QUALIFIED ASSOCIATE FINANCIAL PLANNER™ (QAFP®) or CERTIFIED FINANCIAL PLANNER® (CFP®) designations are an asset
- Proven history of serving clients in a professional services environment
- Familiarity with insurance industry and proficient with insurance products and features
- Knowledge of insurance and estate planning principles
- Proficient in industry product offerings in the areas of: Life Insurance, Disability Insurance, Critical Illness, Long-Term Care Insurance, Payout Annuities and Segregated Funds
- Proficient with regulatory and compliance responsibilities
- Proficiency with insurance-based applications such as insurance company software, Life Guide and Cannex
- Experience with financial planning software and customer relationship management software are an asset

COMPETENCIES

- Client service focused and committed to exceeding client expectations
- Articulate, tactful and confident interacting with clients
- Critical thinker who exhibits professional judgment in navigating clients through in-force and new business services and activities
- Self-motivated with a clear vision of what is required to be part of a high-performance team
- Exceptional organizational skills with the ability to manage multiple tasks and adjust to changing priorities in a fast-paced environment
- A team player with a proven track record of building trusting and productive relationships with colleagues and clients alike

WHAT WE OFFER

A culture of openness, collaboration and respect is foundational to our firm. We are a diverse, driven group of individuals who genuinely care about one another and encourage and appreciate each other's contributions. We believe in rewarding team members and do this by providing a competitive total rewards package that is fair and equitable; mentorship programs; flexible work options; and a variety of professional development opportunities to expand your career. This role has an expected salary of $55,000 – $65,000/year, plus the potential for bonuses.

Our team is growing, and we've got room for one more if you're interested. If this sounds like the environment you'd like to work in and you have the credentials and experience for this role, we invite you to submit a cover letter and resume to careers@odlumbrown.com by **May 3, 2024**.

Candidates must be legally eligible to work in Canada. Full disclosure of any restrictions must be disclosed at the time of expressing interest and supporting evidence provided prior to any potential offer of employment.

We appreciate your interest and thank you for taking the time to consider this opportunity. We will be in touch with individuals whose profiles most closely match what's needed to be successful in this role.