RICHARDSON GMP

Position Title	**Insurance Advisor, Service and Sales Support**
Location	Calgary, Toronto and Montreal
Reporting To	VP Tax and Estate Planning, or designate; accountable to the Insurance division
Job ID	TEP - 006
Position Overview	The Insurance Advisor will service an existing portfolio of Richardson GMP life and living benefits insurance clients and act as the in-house Regional Subject Matter Expert for insurance product solutions. Segregated Funds sales and service will be an important element of the role as well. The Insurance Advisor will report to the Regional VP Tax and Estate Planning, providing existing insurance administration and support as well as assembling insurance and living benefits proposals for a segment of new Richardson GMP clients of insurance. Marketing and sales is required but not a focus of this role. Participating in Branch meetings and organizing and hosting Branch presentations on insurance product updates etc is an element of the role. Insurance analysis and presentation to our clients is required. Follow up in the sales cycle and client-management processes are critical to maintain.
Duties and Responsibilities	• Provide support to IA teams looking for product information as well as provide technical and administrative support for changes to our in-force insurance business • Engage with clients to update their insurance files, and to complete any additional information or forms as required • As an extension of the Tax and Estate Planning team as well as the IA team, help to maintain client relationships through regular contact required by service opportunities while providing value added information, advice and recommendations • Understand the inherent compliance risks and minimize potential regulatory issues through thorough documentation of client communication and attention to detail • Work effectively in a team based environment with one common goal • Engage with the leadership team and IA teams of the branches in the region • Deliver insurance product and solutions presentations
Qualifications	• A track record of prompt and efficient service to clients • Time management, organization skills and attention to detail • Excellent interpersonal/relationship building skills to foster strong, positive and trusting client relationships • Knowledge of investment products and services • Proficient in Microsoft Office Suite – specifically Word and Excel • Proficient in English, written and verbal (Calgary, Toronto) • Bi-lingual is a must for Montreal based position, otherwise French is considered an asset for Toronto based position
Education	• University degree or College diploma in Finance preferred • Life, Accident & Sickness Insurance licensed • Registered Representative (RR) license with IIROC and/or Certified Financial Planning certification or candidate considered an asset