Position Title: Associate Financial Advisor - Richard Van Dyke Insurance Group Inc

Summary:

The Associate Financial Advisor (AFA) plays a strategic role in supporting and growing the agency through outbound prospecting, client contact and sales activities. The AFA must be a great team player, outgoing, results driven, confident, fun and competitive. This role would specialize in both life insurance and wealth products. The AFA will identify prospects in both personal and business markets, determine needs and as a trusted Associate Advisor, make informed product recommendations. I am looking for an individual who is well connected in the Guelph and the surrounding area.

Roles and Responsibilities:

- Support development of the agency operation through the sales and profitable growth of life and investment products.
- Connecting with clients to put together both a Financial and Retirement Plan and having regular follow up meetings to ensure clients stay on tract with their goals
- Service and support the life and investment portfolio of the agency while adhering to compliance rules and regulations for the sale of life insurance products.
- Proactively complete client reviews focusing on life and investment 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
- Achieve individual goals for client service, sales, quality and productivity and contribute to the achievement of overall agency sales and growth goals
- Develop annual marketing plans outlining strategies and activities to meet goals in each product area of responsibility
- Support programs to build multi-client relationships.
- Respond to and investigate client questions and concerns, resolve client complaints and escalate issues appropriately
- Support the agency team in their daily activities

Working Conditions:

Physical Location: 403 Arkell Rd. Unit 5, Guelph ON.
Regular office environment with some evening work required and some travel outside of the office.
Willing to work flexible hours.

Qualifications and Skills:

- Life License is required
- Mutual Fund License is required
- Professional designation (PFA, CFP or CLU) is preferred but can be obtained within 2 years
- Meet all provincial-licensing requirements in accordance with continuing education in order to obtain and maintain all licenses
- A minimum of 2-3 years sales experience or related business or marketing experience is required
- Knowledge of insurance and investment products and strong underwriting skills is an asset
- Strong skills in communication (verbal and written), organization, time management, client service, decision making, problem solving
- Candidate must be comfortable in a technology dependent environment including proficiency with Microsoft Office
- Valid driver's license is required

The successful candidate shall be subject to a Criminal Record and Consumer History background check as a condition of employment.

To apply for this position please send your resume by March 29, 2024 to:
richard_van_dyke@cooperators.ca