

TIPI Insurance Partners

Individual Investments Support Specialist, Full Time Permanent

Work location: This position may be based at any of TIPI's office locations in **The Pas, MB; Winnipeg, MB; or Saskatoon, SK.**

The Opportunity

TIPI Insurance Partners is looking for a highly organized and motivated **Individual Investments Support Specialist** to join our team. If you thrive in a fast-paced, collaborative environment and are passionate about administrative support in the insurance industry, this could be the perfect role for you. You will play a key role in managing client accounts, assisting with documentation, and supporting individual account executives. With a clear path for growth, this position offers opportunities to develop your skills and advance toward becoming a licensed Account Executive specializing in individual investment products.

Job Duties and Tasks

- Pre-fill and review individual investment forms to ensure accuracy and completeness of client information.
- Proactively follow up with clients to gather missing documentation and provide updates on account status.
- Collaborate with individual account executives to ensure efficient account management and smooth processing.
- Handle client inquiries related to individual investments and products, both via phone and email.
- Assist in resolving discrepancies in investment accounts and work with clients and account executives to reconcile issues.
- Identify and implement process improvements to streamline documentation and enhance client communication.

Your Skills

- Detail-oriented with the ability to manage multiple tasks and priorities
- Strong organizational and communication skills
- A natural relationship builder
- Knowledgeable of Indigenous Culture and Communities
- Knowledge in Individual Investment Products is an asset

Your Ideal Qualifications

- You are a team player, client focused and willing to try new things.
- You have experience working with client documentation, data entry, and handling sensitive information with confidentiality.

What we Offer

- Attractive salary and benefits package
- Group benefits and pension plan
- Opportunities for growth and training

As an Indigenous owned organization, we strive to create a welcoming environment for all, and to continue creating opportunities for Indigenous persons within our industries. Preference may be given to qualified Indigenous candidates. Please self declare on your application.



ABOUT THE TIPI GROUP OF COMPANIES

TIPI Insurance Partners is part of the TIPI Group of Companies, which is an economic development engine that drives capacity and employment opportunities for our communities and clients.

Currently, the TIPI Group of Companies is made up of TIPI Insurance Partners, TIPI Insurance Services, Truth and Reconciliation Partnerships, TIPI Legacy HR+, and HQ Benefit Solutions.

We strive to provide products and services that contribute to individual and corporate health, wealth and longevity. Together, we provide professional advisement and access to services in six areas:

- Commercial Insurance
- Group Pension & Benefits
- Group Benefits Administration
- Human Resource Services
- Training and Development
- Talent Search & Recruitment

Our values of Trust, Compassion, Friendship, Social Responsibility, and Professionalism along with the Seven Sacred Teachings are foundational to who we are as a company and the work that we do.

To Apply:

Please submit your application to hr@tipipartners.com.

If this isn't quite you (yet), we are always willing to train the right person, or we may have another opportunity for you!