

ASSOCIATE SPECIALIST

We are looking for an Associate Specialist for a full-time role in our Richmond office. We are seeking a candidate that has an interest in the life insurance industry and is looking for potential growth and upward mobility within our company.

Canada Financial group was founded in 2000 and has grown to become a leading Managing General Agency. We currently serve over 1200 independent financial advisors across Canada with offices in British Columbia, Alberta and Ontario. We have been growing exponentially over the past year and will continue to do so. We are looking for intelligent and friendly people to join our close-knit team.

Please apply for the job by filling out the form on our career page (<https://www.canadafinancial.ca/careers/>). We thank all applicants for interest in this role however only those chosen for an interview will be contacted.

Responsibilities and Duties

- ❖ Handles all incoming and outgoing mails
- ❖ Prepare and arrange all outgoing mail via courier, regular post, pick up or delivery
- ❖ Scan documents and forward them to staffs in other locations
- ❖ Answering and transferring phone calls and greet visitors
- ❖ Ordering and maintaining office supplies
- ❖ Maintain the tidiness of the Richmond office
- ❖ Word processing and data entry- Maintain the integrity & confidentiality of all the files
- ❖ Manage the boardroom calendar
- ❖ Provide assistance in setting up conference calls & events streaming
- ❖ Provide assistance to all company events and seminars
- ❖ Communicate with fund companies and insurance companies for fund transfer tracking
- ❖ Receive ongoing training to be the future Advisor Specialist

Qualifications and Skills

- ❖ Highly organized with exceptional multitasking skills
- ❖ Skilled and experienced with Microsoft Office
- ❖ Able to speak on the phone in a professional manner
- ❖ Extremely resourceful and able to work well with minimal supervision
- ❖ Demonstrate maturity and able to act with discretion and superior judgement
- ❖ Must be a team player and able to build harmonious relationships
- ❖ Expert level English language skills, both verbal and written
- ❖ Exhibit a high level of confidence and professionalism
- ❖ Experience in the life insurance or financial industry is recommended, but not required

Position Type

- ❖ Full-time

