



Position: Administrator/Case Coordinator

We are looking for an Administrator/Case Coordinator for a full-time position in our Downtown office. We are seeking candidates that have experiences working in the life insurance industry on the Administrative side of the business.

CF Canada Financial group was founded in 2000 and has grown to become a leading Managing General Agency. We currently serve across Canada with offices in British Columbia, Alberta and Ontario. We have been growing exponentially over the past year and is looking for a qualified candidate to join our work family.

Position Summary

CF Canada Financial is looking for an experienced Administrator/Case Coordinator to join our Administrative Team. The qualified candidate will work in collaboration with other members of the Administrative team to provide support for our Advisors.

As an Administrator/Case Coordinator your main responsibilities will involve:

- Provide guidelines for Advisors with applying and maintaining life licenses
- Assisting Advisors with obtaining producer contracts
- Managing ongoing new business requirements and underwriting processes. End-to-end approach (Life, Living Benefits, Segregated Funds)
- Maintaining excellent records and paper trails using our back-office system
- Processing after sales maintenance requests
- Assisting Advisors with commission related questions
- Upholding industry compliance standards
- Continuous improvement and adaptation to industry changes

As an Administrator/Case Coordinator your skills and qualification will include:

- Excellent customer service skills, with a minimum of three years of experience in the insurance industry servicing Advisors.
- Detailed oriented
- Ability to perform in a quick-paced and high-stress environment
- Able to proactively investigate and resolve issues
- Multitasking and prioritization ability to ensure deadlines are met
- Deep understanding of the life insurance industry and all types of insurance products
- Excellent interpersonal, verbal, and written communication skills
- Willness to learn and improve to prevent future issues
- Able to perform individually and share knowledge with team members
- Exhibit a high level of confidence and professionalism
- Proficient in computer software and Microsoft Office Suite
- Ability to operate Virtgate will be an asset
- Substantial training shall be provided to the successful candidate to ensure he or she will be able to smoothly integrate into our team environment and work culture in a reasonable period of time.

Position Type

- Full-time