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### **Client Administrative Assistant**

CF is looking for an experienced administrator to work full time in CF's branch office in Surrey, BC and this is a self-employed position. This person will be the first administrator for a new servicing program that CF is putting together, and this program will be open for CF advisors. CF shall be responsible to bring advisors who have such need for an assistant to work with this position. It is possible that if the demand for such service grows to a level, more administrator(s) will be required. The first administrator of this team will be regarded as the team manager and will stand to create more income for himself or herself.

### **Qualifications:**

- 3 plus years of administration experience in the financial service industry, preferably in life insurance
- Attention to details
- Capable to use different computer software, including Microsoft Word, Excel and PowerPoint
- Personable, communicative, especially with the use of telephone, and servicing oriented
- University degree is a plus but not required
- Able to work in a fast-paced work environment

### **Benefits**

- Training will be provided
- More income opportunities as the administration team expands

### **List of Duties:**

- Business Data Management with a CRM system
- General Administration – phone calls, email follow-up etc.
- Prospecting – assisting advisors to make and confirm appointments and manage different marketing efforts
- Client Servicing
- Business application and policy processing and administration

### **List of Exclusions**

The following lists the activities that are excluded from the sphere of responsibilities of the Client Administrative Assistant:

- Not solicit life insurance business opportunities from any members of the public. Therefore, the person shall not do any cold calling to the public and sell or explain product features to any potential or existing clients;
- Not perform any work that is not financial-service-related;

While we appreciate all applications received, only those selected for an interview will be contacted.