CHAZZ
FINANCIAL

<u>POSITION OVERVIEW</u>

Company: Chazz Financial Inc.
Number of Positions: 2
Language: Bilingualism in English and French is an asset.

Work Model: 3 days office / 2 days field or remote
Alternate Title: Financial Planning & Retirement Consultant

Additional Information:

As the Financial Planning and Retirement Consultant you offer holistic financial planning solutions and identify retirement income options to meet the needs of our clients. You provide subject matter expertise on wealth products and support the growth of investment and life product sales.

What you're responsible for:

- Connecting with group plan members to retain group assets and pro-actively support their financial planning needs by consolidating financial assets into retirement plans.
- Generating new asset or premium business by consulting with potential inbound clients to provide financial planning services, including assessing their wealth management and investment options.
- Conducting annual reviews of financial plans for existing clients by providing illustrations and quotations and identifying additional asset gathering opportunities.
- Participating in the development and enhancement of wealth management products as a subject matter expert and staying abreast of legislative changes and industry trends.
- Delivering educational sessions to clients to enhance their product knowledge and promote available wealth management solutions.

What to expect:

- Meet or exceed quarterly sales targets by working with new and existing clients presenting financial plans.
- This role operates in office primarily and internal software provided.
- Strict confidentiality with respect to client's medical history, financial status and other personal information.
- You will be subject to a Criminal Record and Consumer History background check as a condition of employment, in the event you are the successful candidate.
- You will travel occasionally for internal sales congress and team building sessions.
- Some cold calling required.

To be successful:

- You remain focused and optimistic in the pursuit of a goal, despite barriers, until the objective is achieved and allocate time and resources to effectively manage the sales portfolio.
- You successfully build plans focused on expanding market penetration and apply an innovative mindset to improve operational efficiencies, with a client centric lens.
- You have strong communication skills to influence or persuade others to adopt a specific course of action and can effectively facilitate mutually beneficial solutions.
- You build trusting relationships and provide guidance to support the development of peers.

To join our team:

- You have a minimum four (4) years of progressive experience in the financial services industry, with experience in investment and life product sales.
- You may have a post-secondary degree in Business, Finance or related discipline.
- You have obtained a Mutual Fund License and Life License Qualified Program (LLQP).
- You may have a Certified Financial Planning (CFP) designation.
- You have in-depth, extensive knowledge of Individual, Life and Group wealth products and pension regulations.
- Bilingual French/English would be considered an asset.

What we offer:

- Training and development opportunities to grow your career.
- Opportunities to give back to your community.
- A competitive compensation package and benefits program.