

## **POSITION OVERVIEW**

**Company:** Chazz Financial Inc.

**Number of Positions:** 1

**Language:** Bilingualism in English and French is an asset.

**Work Model:** In office

**Alternate Title:** Group Benefit Specialist

### **Additional Information:**

As the Group Benefit Specialists, you will be focused on acquiring new sales through compliant sales practices and providing client-focused insurance advice and solutions that are based on an insurance needs analysis that satisfies the client's needs. You will be identifying specific personal needs and offer comprehensive advice-based solutions which will include the full suite of Co-operators Group Benefits Insurance products. Also, you will effectively identify opportunities for your clients by promoting Life, Living Benefits, Travel, Wealth, and Retirement Planning solutions.

### **What you're responsible for:**

- Providing a superior client experience, creating clients as advocates by listening and connecting with them through the use of effective discovery discussions, providing insurance advice, leading to tailored solutions aligned to our clients' needs
- Building a corporate memory to enable continuity of client service and future opportunity spotting, across channels and roles, by documenting details of client interactions through appropriate systems.
- Maximizing effective use of technology, tools and sales resources with all clients, ensuring advice driven discussions occur and maintains data integrity, documenting all relevant client service contacts and results.
- Effectively collaborating with the Co-operators group Sales team to meet the needs of small business owners and their employees in line with our annual goals.
- Capitalize on market opportunities and referrals from centers of influence.

### **What to expect:**

- You will travel occasionally.
- You are required to have a valid driver's license and insurance.
- Strict confidentiality with respect to client's medical history, financial status and other personal information.
- Extended work hours, including weekends, may be required during peak periods.
- This role involves direct contact with clients and/or service providers in their environment.

- 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.

**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:**

- General OTL insurance license as well as Life - LLQP license is required for this role.
- Meet all provincial-licensing requirements in accordance with continuing education in order to obtain and maintain all licenses.
- A minimum of two (2) years sales experience or related business or marketing experience is preferred.
- Knowledge of insurance products and strong underwriting skills is 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.