# CAREER OPPORTUNITY

## Client Care Associate – Wealth Management (MF)

Elmira, ON | Full-Time

### POSITION OVERVIEW

We are looking for a motivated individual with strong technical and organizational skills to join our Wealth Management Team, in our Elmira, Ontario office. As a member of our team, you will enjoy a positive work environment, professional training, and competitive compensation. We promote work/life balance.

### ABOUT US

Programmed Insurance Brokers Inc. (PIB) is a leading full-service, multi-line insurance, and financial services agency, established in 1980. As a nationally licensed agency with access to a diverse insurance carrier market and investment firms, PIB offers unique insurance solutions and custom financial services that empower our clients with real choices. Our personalized approach, industry expertise, and commitment to integrity have helped us earn and retain our clients' trust and confidence over the years.

No matter how small or how large your insurance or financial planning needs are - whether you have a personal or corporate need - we can help you find an insurance or financial solution that will work for you.

- Wealth Management & Financial Planning
- Commercial Business Solutions
- Group Benefits & Group Retirement Services
- Life Insurance & Living Benefits
- Home & Auto Insurance

### RESPONSIBILITIES

- Supports one or more Investment Advisors
- Undertake the full administration of our Mutual Fund and Insurance Carrier Business
- Prepare new account paperwork, trade documents, and verify transaction completion
- Respond pro-actively to inquiries or concerns from advisors, clients and distribution partner
- Administers and processes documentation related to client files and regulatory requirements.
- Review documents to ensure data is correct and within specified terms and obtaining and verifying missing or incomplete data
- Maintaining client records
- Follows through on the risk and compliance processes and policies to ensure we safeguard our customers' assets, maintain their privacy, act in their best interests, and ensure an effectively run branch.
- Other tasks inline with this position as assigned
- Participate fully as a member of the team, promote team effectiveness and contribute to a positive work environment

## QUALIFICATIONS

- 3-5 years' relative experience preferably in a financial/insurance environment
- Knowledge in investment processes and procedures (Mutual Funds, RRSP, RRIF, TFSA, RESP)
- Proficient in Microsoft Office suite of products, with the ability to adapt to different systems
- Highly organized, detail oriented, proactive, and ability to multitask
- Effective communication skills (written and oral) and comfortable interacting with Sales Advisors throughout the organization
- Excellent prioritization and organizations skills
- Attention to detail
- Demonstrated ability to take initiative and work independently
- Proactive and customer-oriented attitude, customer focused
- Clear communicator, verbal and written
- Ability to adapt to a changing environment, multi-task and consistently meet deadlines
- Bilingual (French) would be an asset but not required

## BENEFITS AND PERKS

- You will enjoy a very competitive compensation model
- A comprehensive employee group benefits package (health, dental, disability, life and travel)
- Profit sharing and company pension
- Flexibility within the role, hours, and office locations
- Wellness Programs and Social Committee to provide team, family and individual collaboration and culture around strategic goals, fun, wellness, health and lifestyle
- Committed to diversity, equity and inclusion

## APPLY NOW

PIB is an innovative leader in the insurance industry. Our head office is in Elmira, ON, with subsidiary offices in London and Chatham, ON, Bedford, NS, and Edmonton, AB. Learn more at: www.pib.com

We'd like to hear from you: APPLY HERE!

As 'owners serving owners' we are passionate about providing attentive service and helping our clients manage the complexities of risk in rapidly changing times.

Our expert advisors deliver trusted insurance and risk management advice anchored in a deep understanding of our client's business.

Our professional team is committed to making a difference in the communities they serve.

## Navacord - Building the Great Canadian Brokerage

Navacord is a leading insurance and risk management brokerage created to keep the Canadian entrepreneurial spirit alive. Led by a passionate and engaged partnership group, Navacord Broker Partners are committed to the success of their clients by delivering expert advice in an increasingly complex world which allows them to face the future with confidence.

- 2,000+ Employees
- 50,000+ Commercial Clients
- ~$400 Million Revenue
- ~$2.5 Billion Annual Premium
- 60% Commercial
- 25% Personal Lines
- 15% Benefits

Navacord is actively committed to support diversity, equity, and inclusion. We serve, recognize, and respect human differences and similarities. We value the diversity of people and actively encourage women, indigenous peoples, members of visible minorities, people with disabilities, and lesbian, gay, bisexual, transgender, and queer (LGBTQ2+) persons to apply.