

CAREER OPPORTUNITY



Client Care Associate – Wealth Management

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

- Responsible for working with our Insurance Carrier business – RRSP, TFSA, Non-Reg, RRIF, LIF
- Working with GIC Block
- Working with assigned GRS Block
- Processing Statements (Annually and Quarterly)
- Processing Buys/Trades and Redemptions
- Process Death Claims
- Maintain client records
- Department reporting
- 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' work 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
- Mutual Fund license would be an asset by not required
- 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.



Local Touch. National Strength.™