Account Representative

New Business Department:

This vital department ensures that all business submitted is processed effectively and efficiently in an effort to expedite the administration and issue of policies and service requests. The goal is to reduce the time between submission of applications and settlement of policies while maintaining good service in a professional manner.

About the Position:

An Account Representative reports to the New Business Team Leader, and is responsible to ensure all new product sales and in-force business requests are transacted effectively with the advisor and carrier. You will ensure that the methodology for case follow-ups achieves excellent customer service on all advisor accounts; this is measured with the achievement of each Advisor Service Commitment.

Essential Accountabilities:

- Implement and expedite the processing of all new business and inforce service requests for Life and Living Benefit product lines to enable the commission payment and completion of the application and service request;
- Implement and expedite the processing of all new business and inforce service requests and meet trade deadlines (including additional deposits, fund transfers, switches, withdrawals, surrenders and T2033 transfers, maturities) for Investment product lines (Segregated Funds, Annuities, GIC) to enable the commission payment and completion of the application and service request;
- Maintain good client relations, in person, over the telephone and in writing/email;
- Meet or exceed timelines with accuracy following established guidelines for business transactions, functions and customer service as it applies to the New Business Department; and
- Maintain up-to-date records of communications using established procedures.

Essential Responsibilities:

- Ensure daily new business and in-force service follow-up procedures are carried out to conclusion;
- Add new account information to systems with appropriate follow-up to ensure client records are set up for accurate processing and management reporting;
- Scan and upload documents to our systems and/or website where required;
- Photocopy documents or correspondence where necessary;
- Data entry to our established systems;
- General office duties such as banking, couriers when necessary;
- Provide back up assistance for team members where necessary;
- Other duties as assigned;
- Observe and implement established company policies and procedures; and
- Uphold company’s confidentiality and privacy policy.

Required Skills / Competencies / Attributes:

- Excellent communication skills, including the ability to target required messages to specific audiences, both written and verbal;
- Highly organized, with a high level of accuracy, thoroughness and attention to detail;
- Effective listening skills are essential;
- Ability to remain calm and work well under pressure;
- Ability to meet deadlines and critical tasks;
- Confident self-starter with limited need for supervision;

- Ability to prioritize assigned tasks, multi-task, problem solve and effectively implement solutions;
- Accurate data entry skills required with a strong attention to detail;
- Ability to perform specific tasks, determine inaccuracies and communicate appropriately to parties involved;
- Team-player with a proactive approach to developing the team and improving systems;
- Integrity and ethics are part of this person's core beliefs; actions will speak for themselves; and
- Willing to learn, grow and develop within the organization.

Specific Qualifications required for this position:

- 1 year related administrative (phone and computer based) customer service industry experience in any insurance or investment product capacity;
- Knowledge of 1 or more product lines (Investment, Life, Living Benefits and Fixed Term Investments);
- Experience with methodology for proactive account management and regular instruction to advisor (understands the variables and multi-tasking aspect of position);
- Typing speed of 50 wpm;
- Excellent computer skills and proficient with Microsoft Office; and
- Organized with high level of accuracy, thoroughness, and attention to detail.

Education:

- High School Diploma;
- Business Administration Certificate or Diploma would be considered an asset; and
- Financial Services related courses would be considered an asset.

Required Accreditation(s):

- n/a

Special Conditions:

- n/a

Diversity:

Diversity in the workplace, one of our shared values, lies at the heart of our rewarding, open, supportive and inclusive work environment. We respect and respond to the many competing and evolving priorities in our lives so you can focus on what you can do best – putting clients first.

About the Company:

Global Pacific Financial Services Ltd. is British Columbia's pioneer Managing General Agency offering sales, marketing and administrative support to our network of Independent Insurance and Financial Advisors. The organization focuses on providing a high standard of service with value added services and support for our associates.

Global Pacific is a leader in its field. We process a large volume of insurance and investment applications as well as providing customer service to policyholders and advisors. For more information, go to www.globalpacific.com

Salary commensurate with experience.

Only qualified candidates will be contacted for an interview.