



Erb and Erb Insurance Brokers, a division of Lackner McLennan Insurance Brokers is a team of dedicated professionals who provide our clients with best-in-class service and products within the insurance and financial services industry. We are a progressive and innovative firm who seeks an energetic, driven, and thoughtful individual to join our team.

## **Position: Life Insurance Advisor**

### **JOB SUMMARY:**

As a Life Insurance Advisor you will be a sales oriented individual with product knowledge and experience in the life insurance marketplace. You will have a high level of integrity, professionalism and reliability. In addition, you will exhibit the very best offering of customer service to prospective and current clients by listening to their needs, offering professional advice and maintaining relationships.

### **RESPONSIBILITIES / JOB DUTIES**

Your responsibilities / job duties will include, but not be limited to:

- Advise clients on advantages and disadvantages of various strategies to promote sale of various products
- Assist existing and potential clients with policies, services and claims information
- Actively out in the community, networking to find new clients
- Respond in a timely fashion to referrals provided by internal sources to ensure existing client satisfaction
- Verify documentation in regards to sales, claims and insurance changes for completeness
- Provide prompt, accurate, and courteous service to existing clients, sales representatives, insurance companies and others regarding accounts
- Service client accounts including review and rating of existing and new accounts, preparing information for renewals, applications, policy changes and cancellations
- Identify, cross-sell, and up sell opportunities and refer other products and services based on client needs
- Work within the organization's workflows, practices and procedures to ensure compliance, including compliance with FSCO (Financial Services Commission of Ontario) and our insurer partner guidelines
- Contribute to the success of the Financial Services Team through supporting other advisors as necessary, participating in various client events, and referring opportunities with the team as well as within the company
- Maintain non-compliance/confidentiality agreement
- Keep abreast of changes, trends, and new products within the financial services industry
- Maintain a high standard of business ethics and values
- Develop positive and professional working relationships with staff, clients and business contacts
- Other duties as assigned

### **QUALIFICATIONS AND EXPERIENCE**

- Life license required
- 1-3 years' experience in the insurance industry focusing on customer service and sales
- Familiarity of insurance regulations and ability to understand written manuals and directives
- University degree or community college diploma in business, insurance, or equivalent experience an asset
- Exceptional customer service skills, a passion for sales and the ability to effectively build productive customer relationships
- Excellent oral and written communication skills
- Competent working with Word, Excel and Outlook and have an aptitude to quickly learn other software programs as needed
- Strong work ethic and positive team attitude

- Ability to work well under pressure with a strong attention to detail
- Ability to deal with people tactfully, sensitively, diplomatically, and professionally at all times
- Highly flexible, with solid interpersonal skills that allow one to work effectively in a diverse working environment

Do these qualifications describe you? If you are interested in joining our dynamic team and demonstrating your exceptional abilities, please email your resume to [careers@erb-erb.com](mailto:careers@erb-erb.com). Please include the position title within the subject line.

*We are committed to providing accommodations (for people with disabilities.) If you require an accommodation, we will work with you to support you through your application and during the interviewing and assessment process. Erb and Erb Insurance Brokers a division of Lackner McLennan Insurance Ltd. is an equal opportunity employer and is committed to a diverse workforce.*