

# Credential<sup>®</sup>

Credential Financial Inc. (**Credential**) is a national wealth management firm providing MFDA and IIROC dealer services, online brokerage, and insurance solutions to over 225 organizations and more than 1,300 advisors. Our mission is to empower positive growth through wealth management leadership, valued advice, and outstanding service—for our partners, for their people, and for ours.

We currently have a need for an **Insurance Case Coordinator** in our Insurance department.

The ideal candidate will be an extremely organized, high-performer who has a great attention to detail, who has strong computer skills and has the ability to work independently and meet deadlines. If you want to be part of a friendly, enthusiastic and motivated team and you believe you have the characteristics listed we would like to hear from you.

## **Expected Contributions:**

- Receive and process insurance applications including data entry of application into insurance database (Virtgate)
- Screen, review and verify policies for accuracy
- Verify and order medical requirements of applications
- Follow up with insurance companies, reps, coordinators and paramedical companies from the time application is submitted to placement of policy
- Conduct follow-ups for status updates on each pending file, update insurance database to reflect status changes and communicate these changes to appropriate parties
- Record policy coverages in the database
- Handle delivery requirements where appropriate
- Assist with problem resolution to ensure speedy policy issue and settlement

## **Experience and Skills Required:**

- Experience in the financial services industry is preferred, credit union experience an asset
- Familiarity with insurance products, applications and medical requirements is an asset
- Exceptional attention to detail is essential
- Ability to multi-task and work well in a fast-paced environment
- Familiarity with insurance databases and websites an asset
- Strong computer skills required
- Excellent oral and written communication skills
- Excellent customer service skills
- Strong team player

*A career with Credential means being part of an organization dedicated to your success. It means belonging to a group of talented individuals who live our values—partnership, innovation and community—every day. Our amazing people and dynamic culture and an exceptional rewards and benefits package are the essence of what sets Credential apart. Visit our website at [credential.com](http://credential.com) to learn more.*