Financial Advisor – PlanRight (Oakville)

Are you looking for unlimited opportunities to develop and succeed? With work that challenges and makes a difference and a flexible and supportive environment, we can help our customers achieve their dreams and aspirations.

Leverage your sales, planning, and relationship building skills to the highest level in our unique environment.

With the strong global brand of Manulife and a team specifically dedicated to keeping your calendar full you can focus 100% on your client's prosperity in delivering world class advice and solutions. You will be rewarded with an unlimited earning potential, competitive benefits package, and a supportive leadership team dedicated to your professional growth and success.

We are looking for results orientated, motivated, energetic individuals who believe they can thrive in an environment like this. If this sounds like you and your curious to know more apply below, read on!

Key Responsibilities:

Provide Advice through effective Financial Planning:

- Provide advice and financial solutions to meet the needs of Manulife clients by utilizing financial planning skills, assessing customer needs and by promoting and selling a full range of financial products. Activities include; client consultations conducting fact finding meetings, needs analysis, completing financial plans, recommending and selling financial solutions and products to meet client's needs, advising clients on group and retail investments, insurance, banking and retirement planning.
- Proactively identify opportunities and conduct activities to help clients achieve their financial goals and generate sales
- Hold both face-to-face and over the phone meetings and record daily activities using the current contact management system
- Leverage financial planning tools to help clients understand what they need to do to reach their goals and to encourage them to act on your recommendations

Building Deep Relationship with clients.

- Become the trusted Financial Advisor to Manulife's valued clients
- Build and strengthen relationships with new and existing clients while meeting clients' short and long term financial needs, recommending a full range of solutions considering the clients' current situation, risk profile, time horizon, and other personal factors
- Proactively establish, develop and maintain strong client relationships through regular contact and providing timely, value-added information, advice and recommendations that consider the latest developments in the markets, the economy, and the investment industry
- Proactively communicate with clients and respond to developing needs, resolve issues or problems and following up as appropriate
- Meet all sales and revenue targets while growing your book of business

Manage your pipeline of leads and Achieve results

- Successfully manage a sales pipeline and demonstrate a high sales closing rate
- Actively follow up on a steady stream of leads provided to you by Manulife
- Develop and continuously execute on an annual business development plan
- Proactively identify additional opportunities to grow the business within your customer block

- Develop and share ongoing best practices, sales, marketing and business development ideas and strategies with peers

Ongoing Training & Development

- Participate in an extensive onboarding program as you transition into the role
- Create and maintain a professional development plan
- Engagement in on-going coaching sessions & observations with your sales manager
- Participate in on-going training sessions to further develop skills

Qualifications:

- Minimum 3 to 5 years of successful experience as a Financial Advisor and/or Financial Planner
- Life License - (LLQP)
- MFDA or IIROC licensed or previously licensed within the last 2 years. If not currently licensed, must be willing to obtain one of these licenses within first 3 months
- Certified Financial Planning designation (or in process of attaining or willing to obtain)
- Knowledge of Manulife products and systems would be an asset
- Experience working with Salesforce and Navi Plan would be an asset
- Computer skills, and a general knowledge level of the MS Office suite of products
- Successfully completed a formal sales training program
- Willingness to travel as needed, will include some overnight travel
- Valid driver's license and vehicle will be required for local travel

Skills required:

- Basic understanding of regulatory / legal environment and issues impacting the sale of life insurance and investment products
- Experience in preparing, developing and presenting financial plans to clients
- Effective presentation skills and delivery to small and large groups
- Ability to work independently and possesses self -management skills to complete workload in a timely fashion and manage competing priorities
- Self-motivated and goal oriented to meet sales and sales targets while growing your book of business
- Coachable: open to innovative approaches and takes actions to continuously improve
- Demonstrated ability to develop effective and professional working relationships with clients and other Manulife partners
- Proven problem resolution and conflict management skills to ensure an effective solution is reached for our customers

About Manulife

Life, health and wealth solutions from a trusted company, backed by global strength and security. Your financial health is important. Manulife helps you make the right choices for your needs and life situation. We serve 20 million customers worldwide through our international network of more than 34,000 employees and 63,000 agents. Manulife is the largest insurance company in Canada and the 28th largest fund manager in the world based on worldwide institutional Assets Under Management (AUM). Our commitment to you is to deliver reliable, personalized advice for your needs, and ongoing service to help you meet your financial goals.

Service you can trust.

About Manulife

Manulife Financial Corporation is a leading international financial services group that helps people achieve their dreams and aspirations by putting customers' needs first and providing the right advice and solutions. We operate as John Hancock in the United States and Manulife elsewhere. We provide financial advice, insurance, as well as wealth and asset management solutions for individuals, groups and institutions. At the end of 2016, we had approximately 35,000 employees, 70,000 agents, and thousands of distribution partners, serving more than 22 million customers. As of June 30, 2017, we had over $1 trillion (US$780 billion) in assets under management and administration, and in the previous 12 months we made $26.7 billion in payments to our customers.

Our principal operations are in Asia, Canada and the United States where we have served customers for more than 100 years. With our global headquarters in Toronto, Canada, we trade as 'MFC' on the Toronto, New York, and the Philippine stock exchanges and under '945' in Hong Kong.

Manulife is committed to supporting a culture of diversity and accessibility across the organization. It is our priority to remove barriers to provide equal access to employment. A Human Resources representative will consult with applicants contacted to participate at any stage of the recruitment process who request an accommodation. Information received regarding the accommodation needs of applicants will be addressed confidentially.

APPLY ONLINE: To apply for this position, please copy and paste the URL below into new web browser to be directed to our online application system.

http://manulife.taleo.net/careersection/external_global/jobdetail.ftl?lang=en&job=RLL1800505