

Associate, Insurance Planning - Wealth & Estate Planning, Canaccord Genuity Wealth & Estate Planning Services Ltd.

Calgary – Job # 4116

Summary:

Through its principal subsidiaries, Canaccord Genuity Group Inc. (“Company”) is a leading independent, full-services financial firm, with operations in two principal segments of the securities industry: wealth management and capital markets

Since its establishment in 1950, the Company has been driven by an unwavering commitment to building lasting client relationships. We achieve this by generating value for our individual, institutional and corporate clients through comprehensive investment solutions, brokerage services and investment banking services.

The Company has Wealth Management offices located in Canada, the UK, Guernsey, Jersey, the Isle of Man and Australia. Canaccord Genuity, the international capital markets division, operates in North America, UK & Europe, Asia, Australia and the Middle East.

Our Canadian operations is currently looking for an enthusiastic, motivated and organized self-starter to join our Financial Planning team. This role will be assisting Financial Planning Specialist within the Canaccord Genuity Wealth & Estate Planning (CGWEPSL) team in Calgary.

Responsibilities:

- Assist with insurance needs and analysis as requested by Wealth & Estate Planning Specialists;
- Provide detailed and meticulous administrative support to the Wealth & Estate Planning Specialists;
- Input a wide variety of client data onto our system in a timely and efficient manner and upload data & documents into our internal system, Ageman, Naviplan, Hub Financial and various Insurance Company software;
- Provide client life and living benefits illustrations;
- Prepare insurance application for clients;
- Complete all record keeping functions with attention to detail and accuracy, ensuring all audit requirements are being met;
- Populate detailed monthly pipeline for Sales, Revenue and Client Planning;
- Follow-up with clients calls and perform other necessary client outreach as required;
- Attend team meetings and assist with projects as required.

Training & Support:

- Provide Investment Advisors with ongoing supplemental support on our Hub Financial and insurance carrier software;
- Provide support to Wealth Specialists during Investment Advisor team group training sessions or one on one sessions.
- Provide support to Insurance Licensed Advisory teams as needed;
- Assist in larger team ongoing improvement projects as required.

Skills & Qualifications:

- Completion of the Life License Qualification Program (LLQP);

- 1-3 years of similar or related administrative experience;
- Knowledge of the Wealth and Estate Planning industry an asset;
- Experience in life and living benefits insurance is an asset;
- Excellent communication and interpersonal skills;
- Excellent organizational skills, with a strong attention to detail;
- Demonstrated ability to multi-task and meet deadlines;
- Ability to work independently and effectively with Investment Advisors, clients and colleagues;
- Demonstrated ability to take initiative and utilize resources provided autonomously;
- Insurance license is an asset;
- Previous NaviPlan software experience would be an asset;
- Intermediate to advanced computer skills: good working knowledge of Microsoft Office (Word, Excel, PowerPoint).

Canaccord Genuity Corp. welcomes and encourages applications from all qualified individuals including persons with disabilities. We will provide reasonable accommodations upon request for candidates taking part in all aspects of the recruitment and selection cycle.

Qualified applicants are invited to submit a resume and covering letter including salary expectations. All applications will be held in strict confidence.

Upon offer, candidates are required to show proof of citizenship, permanent residence or eligibility to work in Canada with no restrictions.

We wish to thank all candidates for their interest but only those applicants selected for an interview will be contacted. Thank you for your understanding.