



Are you looking for a career, not just a job?

Are you a self-starter who wants to build a career in the financial planning organization supported by first-class resources?

LifePlan Investments is an energetic, diverse organization where producers are team-oriented. Our unique value for our team is providing professional coaching and mentoring along with leadership career development opportunities. You will have the opportunity to work in a friendly and family-oriented environment. We provide you with an exceptional administrative support, mobile app, top-notch CRM and other technical support tools to build your career for lifetime. In addition, you can control your career with no pressure of meeting sales quota and grow in a professional environment.

At LifePlan Investments we strive to provide a top-tier experience in a non-traditional, team-based environment that is both intellectually stimulating and fun.

Junior Financial Consultant

As a financial consultant your goal is to help clients create viable plans for managing their finances given individual and family situations. You provide integrated life insurance planning and advice as a trusted partner to your clients. This position allows you to build your own business, with the brand, strength, and stability.

At LifePlan Investments we provide competitive performance-based compensation and financial assistance for qualified candidates to help you develop your career.

POSITION RESPONSIBILITIES

- Assess clients' needs and provide customized financial planning solutions
- Ability to build and maintain client relationships through various prospecting activities such as networking, social media marketing, etc.
- Build rapport with new clients and strengthen existing relationships
- Utilize CRM to manage clients' profiles and keep track of leads and opportunities
- Service on-going clients, advise on insurance matters, conduct needs assessment, recommend solutions, answer inquiries, conduct care calls and process renewals
- Prepare documentation for insurers, complete applications for clients, process changes
- Actively participate in carrier training, workshops and webinars
- Participate in community support and philanthropic initiatives

REQUIREMENTS

- Strong prospecting and business development skills
- Superb problem-solving and analytical skills
- Excellent interpersonal and customer care skills
- Strong time management and organizational skills
- Goal oriented and strong work ethic
- Working knowledge of WealthServ, CRM tools and carrier software
- LLQP licence is required or to be obtained within a grace period
- Other financial designations would be considered an asset

To apply:

Send us an e-mail together with your resume and cover letter to:

careers@lifeplaninvestments.ca

We would like to thank all applicants for their interest in this position. Only selected prospects will be contacted for interview.

LifePlan Investments

LifePlan Investments is a financial planning organization focused on helping Canadians achieve their lifetime financial goals and dreams with the help of advanced technology and trusted financial professionals.

Our Services include:

Life Insurance, Health Insurance, Disability Insurance, Wealth Management, Group Insurance, Tax & Estate Planning, Retirement and Financial Planning, Pension Plans, Employee Benefits, Executive Compensation Planning, Business Owners Succession Planning, Investments in RRSP, TFSA, RESP, RDSP, Mutual Funds, Segregated Funds, Guaranteed Investments, ETFs