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

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.

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 consultant 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

- 2+ years work experience as a financial consultant, insurance broker, or financial advisor
- Strong prospecting and business development skills
- Outstanding 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 carriers software
- Proven track record of successfully managing and closing deals
- LLQP licence is a must
- 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.