



OFFICE COORDINATOR

Eagle Bay Financial Services Ltd. is a thriving and growing, independent Group Benefits & Retirement agency with a passionate team of professionals. Our work serves Indigenous organizations throughout the Lower Mainland/Fraser Valley, British Columbia And Alberta with plans for continued expansion.

Position Summary

We are looking for an "Office Coordinator" to join our team who can multi-task between several departments in our organization. The position includes work directly with our internal team members and 3rd party vendors.

The successful candidate will be teamwork-oriented, multi-tasker, self-disciplined, conscientious, and will strive to exude the values of **Eagle Bay Financial Services Ltd.**

Training will require some in-office time, then mostly work from home, especially during the Covid pandemic. The right candidate must be willing to work on projects with the rest of the team to create and/or complete various tasks and must have Salesforce knowledge.

This position also requires an individual that is able to multi-task in several facets of benefits, insurance and investments with products relative to the task. The primary role is to become the main contact with Salesforce and provide administrative support to the Licensed Agent(s) for pension, individual products and group benefits as needed.

Key Accountabilities

Salesforce

- Become the main point of contact with Salesforce and 3rd party Customization partner and take on the role of in-house product expert. Including;
 - Enter new data and maintain current contacts
 - Perform System Administrator duties ie. testing, reviewing regular communication, coordinating downtime issues, doing secondary research of SF features, coordinating approval processes, resolving billing issues, maintaining good relationships with account manager etc.
- Act as a resource for staff in all departments.

Vendor Management

- Become the main point of contact with IT & various technology providers
 - Perform System Administrator duties for services such as Microsoft 365 Admin Center Management
 - Perform duties ie. coordinating technology improvements, testing, reviewing regular communication, coordinating downtime issues, coordinating approval processes, resolving billing issues, maintaining good relationships with vendors etc.
- Act as a resource for staff in all departments and provide basic IT support if necessary
- Coordinate communication with IT providers and all other vendors for office equipment and spending, including;
 - Arrange and organize new employee technology setup

HR Support

- Post, monitor, and manage the budget on various job posting platforms, including scheduling interviews
- Provide onboarding education sessions to new team members and introduce office and technology environment

Pension & Retirement Department Support

- Assist with creating files when Statement of Options are received
- Support Advisors with meeting preparation while ensuring the department has enough marketing collateral from Insurers for onsite meetings.
- Communicate any required reports to plan members weekly

Benefits Department Support

- Assist with downloading experience reports from various insurance carriers and enter data into Excel, update related documents with refreshed data if needed
- Assist with creating, revising, and reviewing benefits summaries and education presentations when needed
- Assist with reviewing enrollment forms for large groups when needed





Other Responsibilities

- Work with the entire team in a collaborative and contributory way
- Develop and maintain good relationships with 3rd party vendors and their service representatives
- Complete other duties as required

Knowledge, Skills & Abilities

- Excellent Salesforce and understanding of IT concepts and knowledge
- Multi-tasking, coordination and communications skills (written, verbal)
- Advanced level Microsoft Office skills (Excel, Word, PowerPoint, Outlook, Teams)
- Strong attention to detail and organizational skills
- Ability to give direction and manage shifting priorities and deadlines
- Ability to work independently and self-manage time and assigned tasks with minimal monitoring
- Knowledge of Group Benefits and Retirement plans and Individual investment & insurance products available in the Canadian marketplace
- Strong commitment to privacy and confidentiality

Education & Experience

- Completion of diploma degree or equivalent combination of work experience
- 3+ years work experience in a professional work environment, with relevant office assistant/coordinator role
- 2+ years work experience in Group Benefits, Group Retirement and/or Individual Insurance/Investment products
- Experience in working with Indigenous clients and First Nations communities is an asset
- Knowledge of FNHA Health Services delivery in BC an asset
- Knowledge of Non-Insured Health Benefits (NIHB) delivery in Alberta & other provinces is an asset
- Understanding of tax exemption rights as they relate to the rights of property of a Status Indian (Section 87, The Indian Act) an asset

Self-Discipline / Workplace Info

- Training will require some in-office time in West Vancouver, BC, then mostly work from home, especially during the Covid pandemic.
- The ideal candidate will be required to be accountable for their time, a weekly activity report to management will be required.

What We Offer

- Competitive salary and compensation package that includes a generous benefit program including a group health, wellness and retirement program
- Paid time off between Christmas and New Years
- Be part of a positive, supportive culture that values quality innovative solutions
- Mentorship from an industry-leading management team
- Flexible work schedule in a business casual environment
- A fun and collaborative work environment
- Purposeful work that aims to encourage and promote healthy people and clients
- Located in West Vancouver at Park Royal close to the transit, shops, restaurants, services and nature walks along the seawall
- Great snacks and delicious coffee!

Please send your cover letter and resume to info@eaglefinancial.ca quoting the position title in the subject line.

We thank all who apply, however only those short-listed will be contacted. No phone calls please.

