



CLAIMS ADVOCATE & CLIENT SERVICE REPRESENTATIVE GROUP BENEFITS

Eagle Bay Financial Services Ltd. is a thriving and growing, independent Group Benefits & Retirement agency with a passionate team of professionals. Our collaborative work environment serves clients throughout the Lower Mainland, Fraser Valley and British Columbia. Our head office is located in West Vancouver near Park Royal.

The Role

You are a positive achiever who is teamwork oriented, self-disciplined, conscientious, diligent and responsible for assisting plan members with every aspect of group benefits, from plan enrollment up to and including plan termination.

What is Expected of You

- Assist plan members and plan administrators with disability and life claim forms
- Assist plan members and plan administrators with Health and Dental Claims (help complete forms, answer inquiries, contact insurer's, pharmacies, and service providers to ensure claims get processed)
- Assist plan administrators with enrollments, and terminations
- Assist plan administrators with online changes ie. Salary adjustments, address changes, class/division transfers etc.
- Support for group benefits Account Managers
- Support communication initiatives with clients on an ongoing basis
- Support/Back up for Account Managers during client visits
- Updating Claims Tracker Spreadsheet
- Assist with Beneficiary Audits

Other Responsibilities

- Review and Prepare Benefit Summaries
- Review and Prepare Power Points
- Review Contracts, Booklets, Invoices for accuracy
- Assist with Plan Amendment
- Assist with Plan Implementation





Key Assets

- Strong knowledge of group benefits
- Clear understanding of record keeping and follow up responsibilities
- Strong attention to detail and organizational skills
- Ability to take direction and manage shifting priorities and deadlines
- Ability to work independently and self-manage time and assigned tasks with minimal monitoring
- Ability to effectively communicate with and support team members who are travelling and working directly with clients
- Ability to speak to and educate plan members regarding matters related to group benefits
- Strong commitment to privacy and confidentiality

Education & Experience

- 3 years + of group benefits and/or group retirement experience, including customer service experience
- Post-secondary education in a related field
- Knowledge of Salesforce an asset
- GBA, RPA or CEBS courses an asset
- Excellent customer service and communications skills (written, verbal)
- Microsoft Office skills (Excel, Word, PowerPoint, Outlook)
- Qualified Indigenous candidates are encouraged to apply

Self-Discipline / Workplace Info

The position will be primarily a work from home role in the short term. The candidate will be required to be accountable for their time and expected to make most effective use of 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!

How to Apply

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.

