Eagle Bay Financial Services Ltd.

Client Service Specialist
Group retirement & Individual services

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, and will strive to exude the values of **Eagle Bay Financial Services** Ltd.. You have the ability to work independently in a fast-paced environment with emphasis on the ability to effectively manage time, prioritize, communicate effectively, and deliver excellent client experiences.

What is Expected of You

- Responsible for client support as a first point of contact, respond to client inquiries, investigate & initiate required actions that are time sensitive
- Provide administrative, service & organizational support to Servicing Advisors/Account Managers in the department
- Create and update plan designs
- Support Advisors with product sourcing, quoting, meeting preparation, policy submission & ongoing new business development activity
- Responsible for supporting Servicing Advisors/Account Managers to ensure group retirement plans are meeting and/or exceeding all regulatory requirements on a monthly/ongoing basis
- Work with client files & keep informed of required documentation & file management practices in accordance with regulatory & fiduciary requirements including maintenance & enhancement of in-house CRM & other record keeping programs
- Responsible for proactively assisting employees that leave their place of work with their available options
- Provide information, respond to & support in all areas related to group and individual investment clients & work with support representatives internally and externally
- Schedule & arrange client visits with the support of Servicing Advisors/Account Managers

Other Responsibilities

- Work with the entire team in a collaborative and contributory way
- Keep versed with the changing landscape of financial markets & financial products
- Develop and maintain good relationships with Insurance Companies and their service representatives
- Complete other duties as required

Knowledge, Skills & Abilities

- Excellent Sales, Customer Service and Communications skills (written, verbal)
- Advanced level Microsoft Office skills (Excel, Word, PowerPoint, Outlook, Teams)Microsoft Office skills (Excel, Word, PowerPoint, Outlook)

- CRM skills (Salesforce) considered an asset
- Strong attention to detail and organizational skills
- Clear understanding of record keeping and follow up responsibilities
- Ability to give direction and manage shifting priorities and deadlines
- Ability to work independently and self-manage time and assigned tasks with minimal monitoring
- Able to speak to and educate plan members regarding matters related to group retirement, this includes group presentations delivered in-person & through virtual means
- In-depth knowledge of Group Retirement plans (primarily defined contribution pension plans, but also RRSP, TFSA & other group retirement products)
- In-depth knowledge of Individual investment & insurance products available in the marketplace
- Strong commitment to privacy and confidentiality
- Cultural sensitivity and empathy are always essential when interacting with clients

Education & Experience

- Completion of post secondary degree or equivalent combination of work experience
- Minimum 5 years work experience in a professional, customer service role
- Minimum 3 years work experience in Group Benefits, Group Retirement and/or Individual Insurance/Investment products
- RPA and/or CEBS accreditation an asset
- Experience in working with Indigenous clients and First Nations communities an asset
- Knowledge of FNHA Health Services delivery in BC an asset
- Knowledge of Non-Insured Health Benefits (NIHB) delivery in Alberta & other provinces 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
- 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. Client visits will eventually be part of the role with some travel required. Limited time in office. 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

Eagle Bay Financial Services Ltd. offers a competitive salary and compensation package that includes a generous benefit program including a group health, wellness, and retirement plans. Our office is located on the North Shore, close to transit and free parking.
The position is Monday-Friday, Full-Time.

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.