Eagle Bay Financial Services

Client Service Specialist
Group retirement & Individual services

Eagle Bay Financial Services 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.

The Role

We are looking for a "Client Service Specialist" to join our team. The position includes working directly with our internal team members (primarily our Group Retirement Servicing Advisors/Account Managers) and with our clients; Plan Administrators/decision makers and Plan Members/Employees.

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

When fully trained, this position will have advanced knowledge of our group retirement services practice as well as individual retirement and insurance planning products offered by all major Insurance Companies in Canada. Promotions and additional opportunities may present themselves based on skillset and success in the role.

Key Accountabilities

- 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
- Support Advisors with product sourcing, quoting, meeting preparation, policy submission and ongoing new business development activity
- Support Advisors/Account Managers with group retirement servicing
- Work with client files (individual and group) and keep informed of required documentation and file management practices in accordance with regulatory and fiduciary requirements. This includes maintenance and enhancement of in-house CRM and other record keeping programs
- Responsible for proactively assisting plan members employees that leave their place of work with their available options
- Provide information, respond to and support in all areas related to group and individual investment clients and work with support representatives internally and externally

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

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Knowledge, Skills and Abilities

- Have excellent, Customer Service and Communications skills (written, verbal)
- Advanced level Microsoft Office skills (Excel, Word, PowerPoint, Outlook, Teams)
- 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
- Knowledge of Group Retirement plans (primarily defined contribution pension plans, but also RRSP, TFSA and other group retirement products) is an asset
- Knowledge of Individual investment and insurance products available in the marketplace
- Strong commitment to privacy and confidentiality
- Cultural sensitivity and empathy are always essential when interacting with clients

Education and 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 an asset
- Experience in working with Indigenous clients and First Nations communities is an asset
- Understanding rights of a Status Indian (Section 87, The Indian Act) is an asset
- Qualified Indigenous candidates are encouraged to apply

Self-Discipline / Workplace Info

- This position is hybrid, in the office located in West Vancouver, BC and from home
- The ideal candidate will be required to be accountable for their time, a weekly activity report to management will be required during probation period.

What We Offer

Eagle Bay Financial Services 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 kristi@peoplebiz.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.