



Associate Financial Advisor

Are you passionate about helping clients achieve their financial goals? We are seeking a dedicated Associate Financial Advisor to build lasting relationships, provide expert advice, and drive sales growth in our investment and life insurance portfolio. You will be responsible to adhere to regulatory requirements and compliant sales practices while driving sales growth in our investment and life insurance portfolio, through outbound prospecting, new client acquisitions, as well as deepening existing client relationships.

WHAT WE CAN OFFER YOU:

- Competitive salary
- Comprehensive benefits package, including health, dental, & retirement savings.
- Opportunities for professional growth and development within a supportive and inclusive work environment.
- Be part of a company that values community, sustainability, and exceptional customer service.

WHAT YOU WILL DO:

- Contributing to the development and sustainable growth of the agency's life, group and wealth management portfolio while providing client-centric service and solutions, including segregated and mutual funds.
- Proactively engaging in holistic client reviews focusing on life, group and wealth management products, while identifying and referring clients to peers to meet all of the client's insurance needs, in accordance with the agency Business Plan.
- Conducting needs analyses, reviewing client financial goals, providing recommendations in alignment with Know Your Client requirements, opening new accounts and documenting recommendations or changes.
- Respond to and investigate client questions and concerns, resolve client complaints and escalate issues appropriately.
- Adhering to compliance rules and regulations for the sales of life insurance and wealth management products.

WHAT YOU WILL NEED:

- Three years of experience in the financial services industry, including experience in investment and life product sales.
- Post-secondary education in a related discipline.
- Life Insurance License and Mutual Funds License, or are willing to obtain.
- Have or are working towards a Financial Planning designation, such as the Certified Financial Planner (CFP), Chartered Life Underwriter (CLU) or Professional Financial Advisor (PFA) designation(s).
- Your own vehicle and valid driver's license.

NOTE: You will be subject to a Criminal Record and Consumer History background check as a condition of employment, in the event you are the successful candidate.



APPLY TODAY!

To apply for this opportunity, please send your cover letter and resume to Rob, at West-Can HR, rob@westcanhr.com. For more information about this position, or for a detailed job description, call our office at 204-727-0008.

Only the applicants who are selected for further consideration will be contacted. We thank all jobseekers for their interest and potential application.

WHY SHOULD YOU WORK FOR OUR CLIENT?

Co-Operators are the leading all-Canadian financial services co-operative, deeply invested in helping Canadians build and grow their financial strength and security. They offer multi-line insurance and investment products, services, and advice that's personalized to your unique need. As a financial services co-operative, they are rooted in the idea that together they are stronger, safer, and more resilient. They provide straightforward financial products, solutions, and advice that put you first.

ABOUT WEST-CAN HR

Our team of Recruiters and HR Professionals are experts at matching jobseekers with career opportunities. Our goal is to connect with jobseekers and support their job search by utilizing our community connections and Jobseeker Network.

If you apply for this position and are selected for further consideration, this is our process:

1. We screen applicant resumes based on the required qualifications for the role.
2. We contact qualified individuals that are part of our Jobseeker Network to share the opportunity with them.
3. If selected, you will meet with the Lead Recruiter so we can learn more about you, your work experience, skills, and qualifications.
4. The top candidates are presented to the employer for selection. From there, we support the interviewing and hiring process.