



## Estate and Insurance Associate - BMO Private Wealth

**Posted by:** BMO Group

**Posting date:** 03-Apr-2023      **Closing date:** 11-Jul-2023

**Education:** post-secondary degree

**Language:** English (Required)

**Job location:**

**Salary:** \$71.3

**Years of Experience:** 2 years

**Vacancy:** 3

**Job Type:** Full Time

**Job id:** CAJ7618085

Expired

### Job description:

1501 McGill College Avenue Montreal Quebec, H3A 3M8

Performs a variety of administrative tasks and delivers service initiatives in support of Estate and Insurance Advisors (EIA). Provides services to EIA, their clients and business partners ensuring operational processes and compliance regulations are followed in order to contribute to the growth of insurance sales, mitigate risk, and support the efficient and effective operation of the business group.

- Ensures the book of business is continuously developing.
- Ensures client needs are met or exceeded by discussing services offered in detail, with a strong sense of appropriate product and service.
- Provides exceptional client experience
- Addresses customer services issues according to established parameters, escalating as required.
- Collaborates with internal and external stakeholders in order to deliver on business objectives.
- Analyzes data and information to provide insights and recommendations.

- Identifies gaps, issues and best practices through monitoring of sales and service performance targets against plans.
- Supports the development of tailored messaging, which may include writing, editing and distributing communications.
- Communicates with internal business/groups for execution of client request and issue resolution.
- Organizes work information to ensure accuracy and completeness.
- Completes complex & diverse tasks within given rules/limits and may include handling escalations from other employees.
- Analyzes issues and determines next steps.
- Broader work or accountabilities may be assigned as needed.

**Qualifications:**

- Typically between 3 - 5 years of relevant experience and post-secondary degree in related field of study.
- Life Insurance Licence is required in the following 6 months
- Advanced knowledge of investment processes and procedures.
- Advanced knowledge of administrative processes and procedures.
- Advanced knowledge of Life Insurance and Investment Products.
- Knowledge of Insurance and group products is an asset
- Knowledge of Trust and Estate service is an asset
- Knowledge of Financial/Retirement planning is an asset
- Knowledge of compliance rules (proprietary and industry).
- Verbal & written communication skills - Good.
- Organization skills - Good.
- Collaboration & team skills - Good.
- Analytical and problem solving skills - Good.

**We're here to help**

At BMO we are driven by a shared Purpose: Boldly Grow the Good in business and life. It calls on us to create lasting, positive change for our customers, our communities and our people. By working together, innovating and pushing boundaries, we transform lives and businesses, and power economic growth around the world.

As a member of the BMO team you are valued, respected and heard, and you have more ways to grow and make an impact. We strive to help you make an impact from day one – for yourself and our customers. We'll support you with the tools and resources you need to reach new milestones, as you help our customers reach theirs. From in-depth training and coaching, to manager support and network-building opportunities, we'll help you gain valuable experience, and broaden your skillset.

To find out more visit us at <https://jobs.bmo.com/ca/en>

BMO is committed to an inclusive, equitable and accessible workplace. By learning from each other's differences, we gain strength through our people and our perspectives. Accommodations are available on request for candidates taking part in all aspects of the selection process. To request accommodation, please contact your recruiter.

Note to Recruiters: BMO does not accept unsolicited resumes from any source other than directly from a candidate. Any unsolicited resumes sent to BMO, directly or indirectly, will be considered BMO property. BMO will not pay a fee for any placement resulting from the receipt of an unsolicited resume. A recruiting agency must first have a valid, written and fully executed agency agreement contract for service to submit resumes.

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