



JOB TITLE: New Business Administrator & Reception
DEPARTMENT: IDC Worldsource Insurance Network Inc. (“IDC WIN”) & Guardian Capital Group Limited (“GCG”)
REPORTS TO: Director of Operations, Prairie Region
LOCATION: Calgary, AB

Guardian Capital requires all new hires to be fully vaccinated against COVID-19 at least 14 days before the start date (subject only to any approved accommodation).

JOB STATEMENT:

Reporting to the Director of Operations, Prairie Region, and working in a fast-paced environment, the New Business Administrator & Receptionist will be responsible for performing a diverse range of administrative duties in our Calgary office that combines Life, Living Benefit Insurance, and Investment knowledge.

ESSENTIAL FUNCTIONS:

- Managing the distribution of internal office communications;
- Booking and overseeing boardroom usage;
- Processing applications submitted and reviewing of information for accuracy;
- Following-up on all pending cases until completion;
- Updating and reporting to producers on pre-issue and post-issue requirements;
- Managing office supply requirements;
- Supporting back office and 3rd party system updates for licensing and E&O insurance requirements;
- Building strong relationships with advisors, carrier home office underwriting teams, and other 3rd party administrators in order to handle processing and service issues;
- Assisting insurance advisors with both new and existing policy information as needed;
- Providing exceptional customer service to all clients (advisors); and
- Performing other administrative duties as required.

QUALIFICATIONS:

- Post-secondary education
- Office administration experience including: mail distribution, switchboard operations, scheduling, and ordering office supplies
- Life, Living Benefit Insurance, and/or Investment product knowledge preferred
- Strong knowledge of the Microsoft Office programs
- Strong customer focus, service orientation and professional acumen
- Excellent communication, organizational and listening skills
- Dedicated team player with the ability to take initiative and act independently
- Strong sense of urgency and ability to prioritize responsibilities

COMPENSATION:

Commensurate with experience

If you are interested in applying for this position, please forward a cover letter and resume in confidence to hr@worldsourcewealth.com.

Worldsource is committed to accessibility in employment and to ensuring equal access to employment opportunities for candidates, including persons with disabilities. In compliance with AODA, Worldsource will endeavour to provide reasonable accommodation to persons with disabilities in the recruitment process upon request. If you are selected for an interview and you require accommodation due to disability during the recruitment process, please notify the hiring manager upon scheduling your interview.

We thank all applicants for their interest but only those selected for an interview will be contacted.

