JT Insurance

Main Floor, London Place
1177 Hornby Street
Vancouver, BC V6Z-2E9
604-684-7291
opportunities@jtinsurance.com
www.jtinsurance.com

Role Description – High Net Worth Private Client Advisor

ABOUT US

In 2019, J.T. Insurance Services (Canada), Inc. celebrated its 50-year anniversary as an independent, leading insurance broker. We value strong relationships with our clients and team members. We have a unique approach to working with our long-term clientele, delivering creative solutions so that they can achieve what matters most to them. We take advising, caring for, protecting and advocating on behalf of our clients seriously. If being a key member of a growing company where your ideas are listened to appeals to you, J.T. Insurance Services is the place for you. We are growing and need amazing people to help us reach our vision. We are a team of fun, dynamic and solution-oriented professionals in downtown Vancouver. We offer competitive wages, comprehensive benefits, flexible/remote work options and opportunities for learning, development, growth and advancement.

ROLE SUMMARY

The primary role of the Private Client Advisor is to identify, generate and actively pursue High Net Worth new business opportunities and qualifying prospective clients based upon the Company's/Private Client Advisor's Strategic Sales Plan, as well as develop sustainable client relationships year over year.

RESPONSIBILITIES

- Responsible for new business development through networking, referrals and various other means of prospecting.
- Provides proactive client service by anticipating and evaluating client needs and responding to client questions and issues in person, over the phone or via email.

- Identifies and presents appropriate products and services to clients and prospective clients through research and involvement with relevant resources, utilizes unit and Company resources when possible.
- Provides prompt and professional client service working in conjunction or supported by licensed Company staff assigned to Account Team.
- Implements appropriate procedures for claims administration and loss prevention activity, as developed and approved by the Company.
- Implements and maintains a quality service plan ensuring the accuracy of binders, policies, and other relevant documents that are delivered to clients.

QUALIFICATIONS

- Level II Broker License.
- University degree or extensive industry experience.
- 3 – 5 years relevant work experience.
- Experience with High Net Worth clientele required.
- Technical knowledge of product area or industry.
- Creative application of product markets.
- Strong organizational skills and high attention to detail.
- Flexibility and adaptability with the ability to multi-task and prioritize.
- Excellent written and verbal communication skills.
- Advanced skills in Outlook, Word, Excel, PowerPoint, EPIC and performing Internet research.
- Ability to work well in a team environment.
- Maintains confidentiality and professionalism.

HOW TO APP

If you’re looking for a fulfilling and challenging career within a dynamic organization, please submit a cover letter and resume outlining your fit to opportunities@jtinsurance.com.