

Technical Assistant

About the role

Reporting to the Associate Director, the *Technical Assistant* will serve as the first point of contact for clients and will be a key technical and administrative resource for the ABS team. The individual in this role will help our team build and sustain good business relationships by providing exceptional front line support and technical assistance that will meet client needs.

We are seeking someone with excellent customer service skills as well as a keen attention to detail and the ability to meet deadlines in a dynamic environment.

Who we are

Advocis Broker Services Inc. (ABS) is a wholly owned subsidiary of The Financial Advisors Association of Canada. Advocis Broker Services Inc was established to serve the needs of financial institutions, financial advisors, and financial planners in Canada. For more information about ABS visit our website at <https://advocisinsurance.ca/>

We offer:

- A collaborative work environment with great opportunity for professional growth and career development
- A competitive salary, flexible schedule
- Benefits include: Extended Health and Dental, Basic Life, Employee Assistance Plan (EAP), paid time off.
- A hybrid working environment, both at home and in-office at our centrally located office space, with an amazing view of Lake Ontario.

Responsibilities include:

- Provide a high level of service to all clients
- Serve as **first point of contact, answering calls and directing inquiries** as appropriate
- Provide general administrative and technical support to the ABS team
- Read, organize and work with detailed source documents and determine appropriate next steps
- Follow operating procedures related to file and record maintenance procedures, complying with applicable regulations
- Assisting with data entry; ensuring all client records (policies, correspondence, emails, etc.) are appropriately filed
- Demonstrate effective workflow management through prioritization
- Support the team by processing and amending documents within the established authority level
- Ensuring accurate and timely issuance of client documentation, and follow-up on outstanding items
- Participate in the development and implementation of policies and documentation standards to support the team

Knowledge/Skills Required:

- Excellent written and verbal communication skills
- A courteous and professional telephone manner
- Excellent organizational and administrative skills
- Strong attention to detail
- Ability to manage competing priorities
- Positive, energetic and professional with excellent interpersonal skills
- Proficient in Microsoft Office with intermediate to advance skills in Excel
- Sound judgment, tact, discretion, diplomacy and professionalism
- Completion of a post-secondary business degree an asset
- working towards insurance designation an asset, as **obtaining RIBO license after 1 year employment will be required.**
- Previous experience in a customer service position (preferably in the insurance field) an asset
- Previous experience with client/broker management software systems (EPIC) an asset

To Apply:

Interested qualified applicants should e-mail their cover letter and resume to resume@advocis.ca.

We are committed to inclusive and accessible employment practices. Please advise human resources when contacted, if you require any accommodation measures to fully participate in our application or hiring processes. Information received relating to accommodation measures will be addressed confidentially.