

JOB TITLE: Case Specialist (1 Year Contract)
DEPARTMENT: IDC Worldsource Insurance Network Inc. (“IDC WIN”)
REPORTS TO: Regional Vice President, Quebec Operations
LOCATION: Montreal, Quebec

JOB STATEMENT:

The key role of the Contract Case Specialist is to provide support and to communicate with the advisors of IDC WIN with the objective of facilitating the settlement of all new business in the most efficient manner possible and to provide frontline customer service and administrative support to the overall daily operational needs of IDC WIN.

ESSENTIAL FUNCTIONS:

Processing – New Insurance Business –

- Reviewing and processing life and investment applications;
- Communicating with the contracting and compensation administrator and/or the other case specialists to ensure timely processing;
- Working closely with each carrier to ensure timely approval and settlement of contracts;
- Communicating relevant information or changes in status of pending business to producers;
- Managing detailed information on Virtgate for efficient tracking and measurement of business and processing performance;
- Overseeing and training future specialists and administrators;
- Managing the new business email inbox on a rotation basis;
- Processing field underwriting and procedural inquiries from advisors; and
- Assisting advisors in ordering medical requirements when required.

Processing – In Force/Policy Service –

- Reviewing and processing In Force policy service requests;
- Working closely with each carrier to ensure a timely decision/approval;
- Processing “non underwriting” policy service requests;
- Placing trades; and
- Fielding advisor inquiries regarding policy service issues and adhering to the service level standards for each advisor group.

Executive Assistance –

- Answering and directing calls received through the main line and greeting customers and visitors;
- Maintaining and coordinating the booking of meetings and conference rooms/facilities;
- Handling incoming and outgoing mail;
- Ensuring adequate inventory of office supplies and availability of carrier forms at all times;
- Monitoring inventory on a weekly basis and initiating requisition from various carriers;
- Shipping supplies to advisor offices upon request;
- Organizing the local events (i.e. lunch and learns, webinars, etc.);
- Supporting the Regional Vice-President with administrative tasks; and
- Assisting management and other staff with tasks as may be assigned from time to time.

JOB SPECIFICATIONS:

- Post-secondary education
- Fluent in English and French
- Fluency in Mandarin considered an asset
- 3 + years' experience working in a customer service environment
- Strong knowledge of MS Word, Excel, Outlook, PowerPoint
- Ability to work effectively and efficiently with minimal supervision
- Ability to handle confidential information with integrity
- Excellent oral and written communication skills and strong negotiation skills
- Detail-oriented with high degree of accuracy
- Ability to multi task and process in a timely manner and meet deadlines
- Organized with the ability to prioritize workload
- Strong problem solving abilities

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 endeavor 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.