

JOB TITLE: New Business Administrator
DEPARTMENT: IDC Worldsource Insurance Network Inc. (“IDC WIN”)
REPORTS TO: Director, Operations, Prairie Region
LOCATION: Calgary or Edmonton, AB

JOB STATEMENT:

The New Business Administrator is responsible for performing diverse administrative duties in our head office that combines life and living benefit insurance knowledge and case coordination. The successful candidate should ideally have a minimum of two years of life and/or living benefits administration experience as well as an understanding of insurance investment products and possess a strong sense and ability to complete detailed reporting while also knowing how to prioritize and multi-task.

ESSENTIAL FUNCTIONS:

- Processing new insurance business, including reviewing applications and forms for accuracy, electronic submission of applications and electronic follow-up on all pending cases until completion;
- Providing new business updates and reports to producers on pre-issue and post-issue requirements;
- Building strong relationships with the head office underwriting team and other third-party administrators in order to handle underwriting and service issues;
- Preparing basic illustrations as needed;
- Providing assistance to insurance advisors regarding both new and existing policy information as needed;
- Performing various investment reporting duties;
- Providing exceptional customer service to all clients; and
- Performing other administrative duties as required.

QUALIFICATIONS:

- Post-secondary education
- Minimum of 2 years of life and/or living benefits administration experience
- Extensive life and living benefit insurance knowledge
- Strong understanding of insurance investment products
- Detail-oriented with a high degree of accuracy
- Ability to work in a team environment
- Strong knowledge of office equipment, Outlook Express and Microsoft Office programs
- Sense of urgency and ability to prioritize responsibilities
- Outgoing and professional personality is essential in building strong relationships with producers, peers, and supervisors
- Ability and desire to adapt to changes in circumstances
- Very strong customer service skills
- Knowledge of Lifeguide, insurance carrier software, WealthServ an asset

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.