

JOB TITLE: Case Specialist
DEPARTMENT: IDC Worldsource Insurance Network (“IDC WIN”)
REPORTING TO: New Business Team Lead
LOCATION: Vancouver, BC

JOB STATEMENT:

Reporting to the New Business Team Lead in BC, the successful candidate is responsible for New Business and Inforce Business servicing to IDC WIN brokers across Canada. The candidate must be a customer centric, self-starter with solid organizational skills.

ESSENTIAL FUNCTIONS:

- Providing full Managing General Agency (“MGA”) support to brokers in respect to the new business cycle up to and including policy placement and service;
- Processing new business applications across several lines;
- Managing and overseeing the underwriting and issue process;
- Building a strong working relationship with internal and external partners (i.e. Life carriers and independent brokers); and
- Assisting with marketing and inquiries as required.

JOB SPECIFICATIONS:

- Post-secondary education
- Minimum of 3 years industry experience
- LOMA education an asset
- Strong interpersonal, oral and written communication skills
- High degree of integrity and initiative
- Ability to handle multiple and conflicting priorities
- Ability to work independently as well as within a team environment
- Working knowledge of MS Office, Outlook, Wealthserv, Lifeguide and life insurance carrier product software

COMPENSATION:

Commensurate with experience

****PLEASE NOTE THAT THERE IS A PREFERRED CANDIDATE FOR THIS POSITION****

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.

