

## **Job Posting:** Licensed Insurance Advisor – Group Benefits (Quebec and Ontario)

**Company Name:** Halpenny Benefits and Retirement Specialists

**Position:** Insurance Advisor – Group Benefits

**Location:** 1550A Laperriere Ave. Suite 104, Ottawa, ON, K1Z 7T2

## **About Us:**

Halpenny Benefits and Retirement Specialists is the newest division of Halpenny Insurance Brokers Ltd, a company with roots in Ottawa since 1912. We take pride in providing advice and personalized service to our valued clients, protecting what matters most to them, and offering comprehensive insurance coverage that suits their unique requirements. As we continue to grow, we are looking for reliable, driven, customer-centric, and team-oriented individuals to join our expanding Employee Benefits division.

## **Job Description:**

As a Quebec and Ontario Licensed Group Benefits Advisor, you will be responsible for providing expert insurance advice and personalized solutions to our clients in Quebec and Ontario. Your primary objective will be to understand our clients' needs, assess their risk profiles, and present them with comprehensive insurance solutions that align with their needs.

## **Responsibilities:**

- Conduct thorough consultations with clients to understand their insurance requirements and financial objectives.
- Analyze and assess clients' risk profiles and recommend suitable insurance plans, including health, life, and benefits coverage.
- Develop and maintain strong relationships with existing clients to ensure customer satisfaction and retention.
- Prospect and generate leads through various channels to expand the client base.
- Stay up-to-date with the latest insurance products, market trends, and regulations to provide informed advice to clients.
- Collaborate with insurance carriers and underwriters to negotiate policy terms and coverage options.
- Collaborate with team members to help improve our processes & procedures.
- Prepare and present clear and concise insurance proposals to clients, fully explaining the benefits and terms.
- Provide ongoing support and assistance to clients during claims, policy changes, or other inquiries.
- Maintain accurate and organized client records and documentation in compliance with regulatory standards.

#### **Requirements:**

- Valid LLQP Licence in Ontario and Insurance of persons/Group Insurance of Persons from Autorité des marchés financiers (AMF)
- Proven track record of success as an Insurance Advisor, with an emphasis on Group benefits.
- In-depth knowledge of insurance products, regulations, and industry practices.
- Excellent communication and interpersonal skills to build rapport with colleagues, clients and deliver exceptional customer service.
- Strong analytical and problem-solving abilities to assess clients' needs and recommend appropriate solutions.
- Ability to work independently, manage time effectively, and meet sales targets.
- High ethical standards and commitment to maintaining client confidentiality.
- Bilingualism (English and French) is required.

#### **Benefits:**

Halpenny Benefits and Retirement Specialists is proud to offer a wide array of benefits which include but are not limited to:

- Competitive Salary and Commission Structure
- Employee Group Benefits, including Health & Dental, a wellness savings account, Group RRSP, etc.
- Paid and Unpaid time off
- Flexible Working Arrangements
- An established brand and clientele within our community
- A collaborative working environment including a modern office space – functional and client-friendly
- Continuing Educational assistance for industry designations – Support to obtain CFP and other industry designations
- Collaborative support and mentorship – investing in your development
- Supportive Management – Helping you develop
- An established brand and clientele within our community
- Proven processes and deliverables – customized by our team of experts
- Future partnership opportunities – ensuring our legacy is continued
- An Inclusive and Diverse culture

#### **How to Apply:**

If you believe you are the ideal candidate for this position and have relevant experience, we would be delighted to hear from you! To apply, please send your updated resume and a cover letter outlining your qualifications and why you'd be a great fit for this role to [careers@halpenny.com](mailto:careers@halpenny.com). We look forward to receiving your application!