

## Technical Assistant

### About the role

The **Technical Assistant** will be responsible for providing direct administrative and technical support to the work of Advocis Broker Services. The incumbent serves as a key resource to the ABS team, ensuring proper policy information and documents are kept in the system and may be utilized by the team within established acceptable timeframes. This is a full time permanent role.

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

### 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
- Serve as a point of contact, answering questions and requests within the established authority level
- Ensuring accurate and timely issuance of client documentation, and follow-up on outstanding items
- Work with team members on ad-hoc projects and requests

- Participate in the development and implementation of policies and documentation standards to support the team
- Communicating with insurance underwriters/companies on behalf of the brokers.
- Providing Back up support on day-to-day client services
- Other responsibilities as assigned by the Associate Director, ABS

**Knowledge/Skills Required:**

- Minimum of 1 to 2 years brokerage experience working in an administrative or support role
- Completion of a college or equivalent post-secondary business degree
- RIBO License or wiliness to obtain RIBO is an asset
- Proficient in Microsoft Office Applications
- Excellent oral and written communication skills
- Familiarity with EPIC is an asset
- Ability to work independently and as part of a team
- Ability to multi-task and self-manage work under pressure
- Curiosity and a demonstrated commitment to continuous learning and skill development
- Sound judgment, tact, discretion, diplomacy and professionalism
- Fluency in French is an asset

**To Apply:**

Interested qualified applicants should e-mail their cover letter and resume to [resume@advocis.ca](mailto: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.*