

## Job Posting

<b>Position Title:</b>	Policy Service Administrator	<b>Start Date:</b>	ASAP
<b>Position Type:</b>	Full time, Permanent	<b>Location:</b>	Mississauga, ON
<b>Reporting To:</b>	Supervisor, Insurance	<b>Department:</b>	Insurance

### **Job Objectives and Summary:**

The primary role of department is to process insurance business in accordance with the insurance carrier's process and procedures and within IPCES standards and guidelines.

The primary role of this position is to process life insurance applications, forms and documents for major and minor changes in accordance with the Insurance Carriers process and procedures and within IPCES time standards and guidelines.

### **Job Responsibilities:**

- Review and process Policy Service applications/forms/documents from Submission to completion in accordance to department standards
- Ability to identify problem cases and work on solution
- Follow up cases and maintaining accurate information on W.insurance; expedite each case in a timely manner by doing the necessary follow-up via phone, E-mail or Website inquiry
- Review Amendment/Endorsement and maintain accurate requirements on W.insurance
- Process all notices and statements for Life and Seg Funds business in accordance to department standards
- Process incoming E-mail inquiries (from advisor and carrier)
- Handle phone calls and maintain accurate information on W.insurance
- Work with IPC advisors and their assistants ensuring they are fully aware of the case progress at all times.
- Act as Liaison between planners and carriers
- Stay current with application, forms and procedure changes at the Insurance Companies; ensure current version of applications and forms are on shared drive; keep policy service manuals maintained.

### **Skills and Knowledge Requirements:**

- Completion of post secondary education; undergraduate degree in Business preferred
- Advanced knowledge of Insurance products/ services standards and regulations preferred
- Minimum 2-4 years of work experience in the Insurance industry
- Excellent knowledge of MS Office (Excel, Word, Power Point, Outlook)
- Documentation management skills preferred
- Excellent interpersonal and people skills
- Excellent communication skills (written and oral); ability to communicate clearly and concisely the goals and objectives of the organization to all stakeholders
- Ability to manage multiple priorities across diverse business units; deadline sensitive
- Should have a general working knowledge of overall operational process, products and services.
- Must maintain exemplary customer service skills working across a diverse multi-functional business environment with many stakeholders
- Completion of LOMA 1 and 2 a definite asset

**Working Conditions:**

- Standard office environment; standing, sitting, walking
- Ability to work excess hours as maybe required (evenings and weekends)

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Please forward your résumé and letter of interest to: Human Resources, Investment Planning Counsel Inc. via e-mail at [careers@ipcc.ca](mailto:careers@ipcc.ca) or by fax to 905-212-9158. All applications should be forwarded by **July 2, 2010**.

**In the body of your email or covering letter please indicate the following:**

- 1. Number of years of relevant work experience**
- 2. Number of years of industry experience**
- 3. Salary expectations**

We thank all applicants for their interest; however, only those selected for an interview will be contacted.

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*Investment Planning Counsel Inc. is an integrated wealth management company focused on providing Canadians with the best in financial products, services and advice to help them achieve their financial dreams. IPC has developed a strategy that marries the needs of the planners with that of the Company. IPC's intent is to be the premier choice among financial planners who are dedicated to serving the needs of their clients.*

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