JOB POSTING

INSURANCE ADVISOR (London ON)
INSURANCE SERVICES

The **Insurance Advisor** is responsible for new business (initial provision of insurance services to OMA members who are not clients and also additional products to existing clients), for periodic reviews of existing clients including updating of coverage as appropriate, and for service and advice requests that require a licenced individual to respond. OMA Members includes medical students, residents, practicing physicians, and retired physicians.

The Insurance Advisor is accountable to the Manager, Advisor Team for providing advice and solutions to OMA members and their families. Advisors are responsible for providing excellent customer service and for ensuring proper follow-up and case management for their clients.

Major tasks include conducting insurance consultations, making presentations and implementing initiatives to address and fulfill the insurance needs of OMA Members and their families. The foundation of the OMA Insurance solutions is our set of Group insurance products, supplemented by third party private plans as appropriate.

RESPONSIBILITIES AND DUTIES

- Meet with members, both in person and via phone, email or other methods, to complete comprehensive needs analysis, present concepts, compose and present detailed written solutions/recommendations, complete and file applications and other necessary documents and provide follow-up to members to complete fulfillment of insurance solutions in accordance with department standards, the Advocis/CLU Institute Code of Professional Conduct (CPC) and compliance requirements.

- Present and promote OMA Insurance solutions to members by utilizing client focused, relationship–sales techniques in order to ensure members are initiating action to meet their needs and maintaining appropriate coverage throughout their careers and beyond. Meetings with members may occur at irregular times, outside of normal business hours, and at locations other than the OMA offices.

- Assist with the strategic development of the department in accordance with our vision by presenting ideas to management for discussion and review, providing feedback based on insight gained from direct contact with members, and by assisting in the successful delivery of the OMA Insurance brand promise.

- Handle inbound/outbound calls and emails from/to members regarding insurance.

- Develop and maintain strong working relationships with internal and external contacts to identify and leverage opportunities to promote OMA Insurance offerings including a cross referral system and joint consultations for lifestyle protections and wealth management solutions with MD Physician Services.

- Maintain insurance knowledge and expertise to add value, provide education, information, advice and insurance recommendations to members and others;

- Maintain licenses and designations including appropriate continuing education requirements and providing regular updates to the OMA Compliance officer;

SKILLS, ATTRIBUTES, EDUCATION & EXPERIENCE

- Must be comfortable in a fast paced, dynamic client-focused environment that requires detailed attention to our members' needs.
- Must be able to engage with members across Ontario, utilizing a variety of methods to increase awareness of OMA insurance offerings.
- Must be comfortable with referral systems, networking, and cross-selling as well as conducting and actively participating in seminars and other public speaking events.

- Must be committed to client service and focused on assisting clients in understanding and taking action to meet their needs as a paramount objective.
- Bachelor degree or equivalent.
- **Must** be licensed in good standing to sell life and health insurance in Ontario. Continued professional development, including progress toward the CFP or CLU designations is expected.
- A minimum of 5 years' experience in life/disability insurance sales.

Interested candidates should forward their cover letter and resume to the Human Resources Department at hr@oma.org