

JOB DESCRIPTION

Employee Benefits Consultant

Full time Position

General Accountability

The Employee Benefits Consultant is responsible for prospecting, assessing client needs and securing employee benefits sales within the Province of Ontario with specific targets in the Durham Region. The Employee Benefits Consultant will promote HMA's various exclusive group insurance products as well as other products (life/living benefits, Group RSP/Pension etc.) depending on the clients' needs. In addition, this individual may be responsible to consult with and service the needs of our existing clients.

Organization & Structure

The Employee Benefits Consultant reports directly to Peter Bocking, Partner at HMA. This position is accountable to understand the employee benefits needs of HMA prospects and clients within the assigned territory as well as handling other related insurance needs of individual business owners, operators and their employees. The position is sales based requiring the prospecting and mining of new business to HMA as well as handling existing clients and assisting them in understanding their needs while implementing solutions as their businesses change.

The Partners of HMA will require specific sales targets to be met by the Employee Benefits Consultant. The sales targets will be decided upon by the collaboration of HMA's Partners and the Consultant.

All HMA employees are bound by the code of ethics of an individual licensed to sell insurance products within the Province of Ontario and also by both our privacy policy and procedures and our code of confidentiality. As a client service organization, each employee represents HMA and must provide outstanding customer service and abide by our core values and mission statement.

Nature & Scope

HMA is a well-known and respected employee benefits firm within the Province of Ontario. The Employee Benefits Consultant is passionate about consulting with various individuals and recommending benefits and insurance products to best serve our clients' long-term needs and goals. The position holds a multi-disciplinary list of responsibilities and works within a team environment.

Interested candidates can forward their resume and cover letter to Sherri Rodgers, Director of Operations: srodgers@hmabenefits.ca

Feb. 2017

Essential Functions

- Assess client needs and recommend employee benefits, life and living benefits, and assist clients in planning and implementation of product solutions
- Interact with and educate potential and existing clients in the products that best suit their needs
- Research and source various products and carriers to find the most suitable products for client needs
- Source and prospect potential customers and create interest in our firm and our products
- Secure sales of the above noted products by cold-calling, getting appointments, identifying client pain and budget, propose solutions, obtain commitment and complete applications with payment
- Cross-sell and promote additional HMA products (e.g. life/living benefits, pension, GRSP etc.)
- Embrace and utilize HMA's sales system, tracking system and CRM

Required Skills & Experience

- Life/A&S license required
- 3+ years in sales role, with proven results
- Superior relationship development and communication skills and natural social comfort
- Strong ability to service customer needs and educate them on product and solutions best for their situations
- Proactively addresses and champions a changing environment
- Willingness to embrace the organization's core values
- Strong ability to self-motivate and achieve set goals
- Strong 'hunter' mentality
- Eagerness to learn and mentor with the team