

JOB TITLE: New Business Administrator
DEPARTMENT: IDC Worldsource Insurance Network Inc. (“IDC WIN”)
REPORTS TO: Case Specialist and Administrative Team Lead
LOCATION: Mississauga, ON

JOB STATEMENT:

The role of the New Business Administrator at IDC WIN is to provide key administrative support to the new business processing function of the company.

ESSENTIAL FUNCTIONS:

Business Processing – New Business

- Reviewing and processing life applications;
- Receiving new business applications to upload into WealthServ;
- Reviewing and processing policy contracts;
- Receiving paper policy contracts to be photocopied and uploaded into WealthServ;
- Providing mailroom with new business applications to send to insurance partners for processing;
- Providing mailroom with policy contracts to send to advisors for delivery; and
- Assisting the Case Specialists with other tasks, as required.

Business Processing – Issued Policies

- Receiving and reviewing outstanding settling requirements from advisors;
- Updating and settling requirements received into WealthServ; and
- Acknowledging receiving of settling requirements and communicating with advisors directly to advise of any missing requirements to ensure settlement of the policy.

Business Processing – Policy Services

- Reviewing and processing In Force policy service requests;
- Receiving policy service paperwork to upload into WealthServ; and
- Providing mailroom with policy service paperwork to send to insurance partners for processing.

Other Responsibilities

- Providing reception relief in the absence of Receptionist/Administrative Assistant;
- Ensuring orderliness in the immediate work area; and
- Assisting management and other staff with tasks as may be assigned from time to time.

Innovative Responsibilities

- Promoting professional “image” of IDC WIN by employing exemplary interpersonal skills through telephone and personal contact with customers;
- Developing and offering suggestions to improve customer satisfaction work efficiency and cost reduction; and
- Maintaining open communication with IDC WIN management regarding activities that affect both internal and external business relations.

JOB SPECIFICATIONS:

- Post-secondary education
- Strong knowledge of Microsoft Word and Excel
- Knowledge of WealthServ an asset
- Understanding of life insurance carriers, identification and processes for risk and policy service lines of business
- Exercises flexibility, innovation and creativity to get tasks done in a timely and accurate manner
- Excellent communication and interpersonal skills
- Positive attitude and team player
- Strong attention to detail with the ability to meet deadlines

- Strong organizational and problem-solving skills

COMPENSATION:

Commensurate with experience

If you are interested in applying for this position, please forward a cover letter and resume in confidence to careers@worldsourcewealth.com.

Worldsource is committed to accessibility in employment and to ensuring equal access to employment opportunities for candidates, including persons with disabilities. In compliance with AODA, Worldsource will endeavour to provide reasonable accommodation to persons with disabilities in the recruitment process upon request. If you are selected for an interview and you require accommodation due to disability during the recruitment process, please notify the hiring manager upon scheduling your interview.

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