



## **PEAK BENEFIT SOLUTIONS INC.**

### **JOB DESCRIPTION**

**POSITION TITLE: Employee Benefit Financial Analyst (FA)**

**REPORTING TO: President, Peak Benefit Solutions**

**Compensation: Annual Salary: \$70,000 + (based on experience), Comprehensive employee benefits and a matching RRSP plan.**

**DATE LAST REVISED: February 27, 2024**

**LOCATION: Kingston, ON or Peterborough, ON**

**For more information or to apply for the position, please forward your resume to [paul@peakbenefitsolutions.com](mailto:paul@peakbenefitsolutions.com)**

**Peak Benefits Solutions Inc.** has been growing steadily and is now seeking to add a new team member to our dynamic team. The shareholders are seeking a mission-focused, strategic, and results-oriented Employee Benefit Financial Analyst (FA), to develop strong, lasting relationships with new and existing clients as well as our Advisor Team.

#### **GENERAL ACCOUNTABILITY**

Reporting to the President of Peak Benefit Solution Inc., the FA demonstrates a “service first” attitude and is a self-motivated individual who provides quality client service based upon their thorough knowledge and understanding of the employee benefits industry. The successful candidate will not only handle a wide range of administrative duties regarding the renewal and claims review process but the quoting process as well. Essentially, they are the go-to team member for solutions regarding options, plan designs and providing solutions for our clients and prospective clients. They are able to not only work independently but will drive innovative thinking using data and metrics of the group block helping us maintain our industry leading client retention rate and sales results. Success: The advisors see you as a true partner and are confident in your analysis, ideas for presenting the proposals you create and overall expertise. The proposals will be timely, competitive, well-researched and accurate for new and existing clients. Your contribution is paramount to our future success and helping to influence our white glove offering to ensure our clients are completely wowed by the “Peak Experience”.

#### **MAIN RESPONSIBILITIES**

- Assist advisors in identifying go-to-market strategies and quoting that differentiates Peak

Benefit Solutions in order to retain existing business and win new business.

- Work with the advisor team to assess existing prospects and client plans to identify opportunities for improvement, efficiency and value and referring clients to our Group Retirement Specialist.
- Liaise with our underwriting team regarding client policies where required as it respects most risks and in understanding underwriting rules and regulations within scope of responsibilities. • Efficiently and accurately prepare and complete all required documentation for the issuance of insurance (e.g. quotes, applications, etc).
- Perform market surveys, analyze the results to create and recommend industry-leading options for our clients.
  
- Provide quotes where appropriate to clients and potential clients and develop sales proposals • Research and communicate one-of-a-kind solutions for hard-to-market clients. • Process policy changes on portals without additional assistance.
- Accurately document pending actions and follow-up as required.
- Consistently review client files where the renewal or claims review is upcoming or required.
- Analyze, negotiate, and process renewals including; reports, communicating with clients, processing master applications and policy terminations, and following-up on required paperwork (e.g. liaising with companies to determine why renewals may not have been processed). • . Accurately maintain documentation within online systems and our CRM.
- Develop and adjust as needed, processes related to client services.
- Lifelong education: Being informed about current industry changes and regulations.
- Work with advisors to prepare proposals that meet and surpass the objectives of their clients. • Inform and educate advisors on the market process and develop procedures that work to everyone's mutual benefit
- Work in a dynamic and changing environment with multiple priorities.
- Maintain a positive outlook and attitude; ability to identify and prioritize tasks and issues. • Successfully resolve routine problems independently.
- Build trust relationships with leaders, colleagues, clients and prospective clients.
- Proudly represent Peak Benefit Solutions Inc. in the community.
- Other duties as required.

## **WORKING RELATIONSHIPS**

**Advisor Team:** Continuous interaction to bring novel concepts, advise, guide and support client attraction, retention and satisfaction.

**Companies:** Ongoing interaction to resolve escalated issues related to customer policies and to maintain up-to-date knowledge of individual company policies.

**Client Experience Team:** Ongoing collaboration to ensure industry leading retention and white glove service for existing and new benefits clients and their employees.

## **SKILLS AND COMPETENCIES:**

- Must be able to drive results and be self-motivated and work well with tight deadlines, constantly shifting priorities and treating the role as though it was your own business.
- Advanced knowledge of Excel required.
- Ability to work independently and driven by results.
- Strong project management and decision-making skills.
- Strong communication skills, both verbal and written.
- Demonstrated ability to build and create strong relationships.

#### **QUALIFICATIONS:**

- The LLQP license is an asset.
- Group Benefits Associate (GBA) or CEBS Designation or in progress • College education in Business or Human Resources, or equivalent experience. • Strong analytical/marketing skills with a focus on creating a great client experience.
- Knowledge of benefits industry, insurers, products, systems and procedures through experience and ongoing education.
- Strong knowledge of MS Office, including Word, Excel, PowerPoint and Outlook.

#### **WORKING CONDITIONS:**

**Physical Effort:** Majority of time is spent in a comfortable position and most activities require a variety of easy muscle movements. Sustained keyboarding with a required ability to sit for extended periods of time

**Physical Environment:** Environment has only occasional exposure to mild unpleasant or disagreeable conditions with remote possibility of accident or health hazards.

**Sensory Attention:** Work activities involve the need to concentrate for intermediate durations and close attention several times daily. Excellent reading comprehension of printed and electronic text required.

**Mental Stress:** Fast-paced work environment with occasional exposure to one or more mental pressures (e.g. deadlines, needs for accurate, potentially difficult clients or situations).

*Please note: The above statement reflects the general details considered necessary to describe the principal functions of the job identified and shall not be considered as a conclusive description of all work required in the position. This job description may be subject to change in order to meet organizational, client or operational requirements.*