

Co-operators Insurance – A.M. Financial Matters Inc.

6-410 Mount Edward Rd., Charlottetown, PE C1E 2A1

**Client Support Representative – Summer Student
May to August 2023****The Opportunity:**

We are a leading Canadian financial services co-operative committed to being a catalyst for a sustainable and resilient society and our team is essential to deliver on this strategy. That's why we prioritize our people, to ensure we provide a strong culture and development opportunities which enables our team to thrive and to live our purpose. The best part is that you will work with people that care passionately about you, our clients and our communities.

Our Distribution team aspires to be the leader in client engagement among Canadian Insurers. We strive to provide a seamless and personalized client experience. Our knowledgeable and trusted team is committed to delivering financial services solutions to meet our clients' unique needs. The main focus of the Client Support Representative is assisting in the co-ordination and implementation of the agency contact program through outbound calling to schedule and confirm appointments for the agent and agency staff. This role supports the agency philosophy of proactive client contact and works with the agency team to achieve profitable growth through dedicated outbound activity.

How you will create impact:

- Complete outbound calls to obtain insurance expiry dates, schedule annual reviews, set and confirm appointments.
- Schedule all appointments on the appropriate calendar.
- Document client profile notes.
- Track call activity including calls dialed, contacts made and appointments booked.

How you will succeed:

- You influence change and are committed to continuous improvement, in order to exceed client expectations.
- You leverage critical thinking skills to identify problems and proactively propose solutions.
- Your strong communication skills allow you to clearly convey messages.
- You're an effective team player who shares knowledge to support your peers.

What you need to know:

- You will be subject to a Criminal Record and Consumer History background check as a condition of employment, in the event you are the successful candidate.
- General Insurance License may be required as part of your development.

**To apply to join our team email resume to aileen_matters@cooperators.ca
by April 10, 2023**