Licensed Sales & Insurance Assistant

Exciting Opportunity to Join a Financial Industry Leader!

Our client, a leading wealth management firm, is searching for a Licensed Sales & Insurance Assistant to join one of their highly successful advisors. This role directly supports the success and growth of the Investment Advisor by organizing and monitoring accounts, placing trades, preparing required documentation in line with compliance requirements, and processing applications. The ability to maintain an efficient work environment while effectively managing confidential information is also required.

Superior organization and communication ability is mandatory as additional responsibilities include maintaining a client database, reviewing transactions and providing client service through taking and placing trade orders as required. The incumbent must be detail oriented, and able to effectively self-manage and work independently.

Education & Experience Requirements:

- Licensed as an Investment Representative (IR) and maintenance of registration through CE credits is required
- A minimum (2) two years in the financial industry is required
- Life Insurance licensing is preferred
- Must have strong numeric aptitude (financial math)
- Post-Secondary Education is considered an asset

Are you ready to join a dynamic, professional, and engaging culture? Let's talk.

To apply for this exciting opportunity, please email your resume to apply@acuityhr.ca. We thank all candidates for their interest; however only those selected for further consideration will be contacted.

For more information about Acuity HR visit our website: www.acuityhr.ca or follow us on LinkedIn.