



Member and Client Services Representative

[Advocis, The Financial Advisors Association of Canada](#), is the association of choice for financial advisors and planners. With more than 17,000 member-clients across the country, Advocis is the definitive voice of the profession, advocating for professionalism and consumer protection. Professional financial advisors and planners are critical to the economy, helping consumers make sound financial decisions that ultimately lead to greater financial stability and independence. Advocis works with decision-makers and the public, stressing the value of financial advice and striving for an environment in which all Canadians have access to the advice they need.

We are looking for an energetic, motivated individual to join our Member & Client Services team. The Member & Client Services Representative is responsible for providing efficient and quality frontline customer service to Advocis members, clients, and prospective clients on a broad range of Advocis' products and services.

Why you'll want to work with us:

- It's a great opportunity for professional growth and career development in financial services
- We promote collaborative environment where new ideas are encouraged, and everyone is empowered to speak up
- We offer a competitive salary, flexible vacation, and paid sick leave and benefits like extended health, dental, life, disability, and pension
- We work hard, but like to have fun (and treats are part of the deal, because we LOVE to celebrate stuff)
- While most of our team is working remotely right now, we look forward to heading back to our nice office space with a fabulous view of Lake Ontario soon. (Oh, and Starbucks is our downstairs neighbor – if you're into \$5 lattes.)

What you'd be doing:

- Providing efficient and quality customer service to Advocis members and clients.
- Participating in inbound sales and retention initiatives focused on maintaining and increasing revenue by promoting the Association's products and services
- Verifying and updating member and client accounts; Processing membership applications, course registrations and performing other related administrative tasks as required
- Other duties as assigned by the Director, Member and Client Services

We are looking for someone who is:

- Positive, energetic, and professional with excellent interpersonal skills
- Proactive, enthusiastic, self-starter with a healthy sense of curiosity and desire to learn
- Organized with good attention to detail
- A Team player who can manage competing priorities
- Driven to deliver a great customer experience (because we all know what a bad customer experience feels like)

This individual should also have:

- Excellent communication skills, both written and verbal (can you find the spelling mistakes in this posting?)
- A courteous and professional telephone manner
- A strong working knowledge of Microsoft Office (specifically Word and Excel) and virtual platforms (e.g., Zoom). Willingness to learn new platforms and applications.
- Completed a post-secondary degree (preferred)
- Experience in, and/or a desire to pursue a career in the Financial Services industry

Interested in joining us?

If you like what you've read so far, then go ahead and send your resume and cover letter to resume@advocis.ca no later than Friday October 29, 2021.

We are committed to inclusive and accessible employment practices. Please advise human resources when contacted if you require any accommodation measures to fully participate in our application or hiring processes. Information received relating to accommodation measures will be addressed confidentially.