

## **FINANCIAL ASSOCIATE, BARRIE & SURROUNDING AREAS**

### **ROLE/DESCRIPTION**

Experior Financial Group is looking for a Financial Associate in Barrie, ON and surrounding areas.

A large part of our success is due to our client solutions built with our proprietary Expert Financial Analysis software (EFA). It provides our clients with a simple easy to follow financial program offered exclusively through Experior Associates to help clients reach their financial needs and goals for retirement and more.

Experior has extensive experience in dealing with a wide range of clients. Thus, we understand that every client is different and we design customized financial approaches fitting to our clients needs. Our team of licensed associates work diligently to ensure that client accounts are constantly updated, processed, and analyzed.

Financial Associates with Experior Financial Group are trained to ensure compliance with finance regulations and company policies.

### **POSITION SUMMARY**

As an associate at Experior Financial Group, you'll be an integral member of a team that helps clients reach their financial goals. You'll need to be professional and friendly when providing services as you assemble a plan that works for your clients. You'll offer your clients high-quality expert advice. You'll own your book of business from day one and work towards reaching promotions based on personal production while building a team.

### **RESPONSIBILITIES**

- + Provide clients with a consultation to determine their current financial situation, including following through on client requests, anticipating client needs, and providing end-to-end guidance;
- + Based on their individualized needs analysis, the financial associate prepares recommendations for customized financial solutions to current and potential customers;
- + Help clients identify risk and manage it appropriately, by understanding the latest developments in the financial world and sharing with clients information that can help them make informed decisions;
- + Complies with all the company's risk and regulatory standards, policies, and controls;

## REQUIRED SKILLS

- + You have the ability to think creatively and solve problems in a fast-paced environment.
  - + You have excellent problem-solving and analytical skills, including the ability to make sound judgments based on available data and information.
  - + You establish relationships with new and existing clients, gaining insights into their unique needs through conversations, establishing trusting rapport that leads to long-term business partnerships.
  - + You must have integrity.
  - + You are caring, reliable, and have a servant attitude.
  - + You are a listener and an effective communicator.
  - + You are both generous and humble.
  - + You are ambitious with the qualities of a teacher.
  - + You are dedicated and passionate.
  - + You are a visionary and a mover.
  - + You possess a positive outlook and are relatable.
  - + You maintain a clean and professional appearance.
  - + You have reliable transportation.
  - + You are looking for a fresh start with a company that makes a REAL difference.
  - + Our associates need to be self-directed, hardworking individuals.
  - + You are a quick learner, wanting to provide the absolute best to your clients and can go to them for the most personalized and convenient service.
- (This is not a salary based position)**

Interested candidates should reach out to [Hello@experiorheadoffice.ca](mailto:Hello@experiorheadoffice.ca) or call us at 1-888-909-0696. Reach out to us today and get started with a new Career at Experior Financial Group!

Not interested in a career with Experior Financial Group? Click [here](#) to check out all of our awesome products and insurance options!