ALITIS
WEALTH PLANNING

Insurance Agent and Financial Planner

Full-Time | Permanent | In-Person

Who We Are

Alitis Wealth Planning Inc., in partnership with Alitis Investment Counsel Inc., is a boutique financial planning firm dedicated to delivering personalized, high-touch service to our clients. Founded in 2009 in Campbell River, BC, Alitis brings an Ultra High Net Worth approach to financial planning, insurance, and estate planning. With over $500 million in assets under management and a team of more than 20 professionals across offices in Campbell River, Comox, and Victoria, we are committed to helping families and businesses achieve their financial goals with integrity and expertise.

We partner with PPI Management Inc., a leading managing general agent (MGA), to offer a comprehensive range of insurance products through Canada's top insurance providers. Our team of Certified Financial Planners (CFP®) adheres to the highest ethical standards, ensuring client interests always come first.

The Opportunity

We are seeking a motivated and detail-oriented **Licensed Life Insurance Agent** to join our growing team. This is an in-person role based in Comox or Campbell River.

The ideal candidate will have 3–5 years of experience as an insurance agent, with a strong passion for client service. Experience in financial planning is essential; a CFP designation or progress toward is preferred.

In this role, you will support Alitis clients and brand by being our in-house insurance planning specialist. You will be managing Alitis' insurance business, servicing existing policies and writing new business for our client base while also sourcing new clients that fit our target market. You will collaborate closely with Alitis Portfolio Managers to deliver integrated financial planning and contribute meaningfully to the support and success of our clients.

A Day in the Life…

- Provide enhanced financial planning for our investment counsel clients by identifying insurance needs and recommending advanced planning strategies.
- Participate in client meetings to help uncover opportunities and deliver tailored solutions as part of an integrated wealth management approach.
- Meet with clients to determine their insurance needs and provide recommendations
- Work with closely with your dedicated administrator to track application progress to completion. This includes regularly follow-up with clients, MGA and carriers.

- Provide exceptional customer service for existing Alitis insurance policies, including renewals, annual premiums, and policy updates.
- Identify and pursue sales opportunities from internal and external sources.
- Engage in community events and networking to build brand awareness and generate leads.
- Continually develop your financial planning skills and, with support, work to elevate the overall financial planning services offered by Alitis
- Stay updated on industry trends, regulations, and product offerings to provide accurate information to clients and advisers.
- Streamline insurance processes for efficiency, compliance and accuracy.
- Collaborate with the advisory team on ad hoc projects, such as reviewing PP&M processes or consolidating contracting.

Note: Responsibilities may evolve based on your strengths and the firm's needs.

What You Bring

- **Experience**: 3-5 years in life insurance sales and or financial planning
- **Licensing**: Valid Life License Qualification Program (LLQP) certification; able to be licensed in BC. Designations such as CFP®, CLU®, or CIM® are an asset.
- **Skills**:
  - Exceptional client service and communication skills, with a client-first mindset.
  - Strong organizational and time-management abilities, with keen attention to detail.
  - Proficiency in insurance products and financial planning strategies
  - Ability to work independently and collaborate effectively with a team.
- **Knowledge**:
  - Familiarity with insurance policy administration, commission reconciliation, and regulatory compliance.
  - Confidence with financial planning, specifically retirement planning, estate planning and risk management.
- **Community Engagement**: Enthusiasm engaging with the community as an Alitis representative.
- **Education**: Post-secondary education in finance, business, or a related field is an asset.
- **Industry Interest**: Specialized knowledge of or interest in financial planning and insurance is an asset.

- **Other:** We are open to discussions with candidates who have an existing book of business, with preference given to those interested in exploring how it could complement and grow within our firm's wealth management platform.

Compensation

Alitis offers a competitive compensation package with a base salary plus commission, providing significant earning potential.

In addition, we offer a comprehensive group benefits program, employer-funded group RRSP, and four weeks' vacation.

How to Apply

Sound like a fit? Send your resume with your name + Licensed Life Administrator and Insurance Agent in the subject line to careers@alitis.ca.

Alitis is an equal opportunity employer. We are committed to creating a diverse environment. All applicants will receive consideration for employment without regard to race, colour, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, or age.

We thank all candidates for their applications; however, only shortlisted candidates will be contacted.

Please note that we are unable to provide any sponsorship or support work visas of any kind at this time. Applicants must be able to work in Canada for any employer in a full-time, permanent capacity without sponsorship.