

**JOB TITLE:** Case Specialist  
**DEPARTMENT:** IDC Worldsource Insurance Network Inc. (“IDC WIN”)  
**LOCATION:** Markham, ON  
**REPORT TO:** Vice President, Operations, Eastern Canada

**JOB STATEMENT:**

The key role of the Case Specialist is to support and communicate with the Advisors of IDC WIN with the objective of facilitating the settlement of all new business in the most efficient manner possible.

**ESSENTIAL FUNCTIONS:**

*Processing – New Insurance Business –*

- Reviewing and processing life applications;
- Communicating with the Contracting and Compensation Administrator and/or other Case Specialists to ensure timely processing;
- Working closely with each carrier to ensure timely approval and settlement of contracts;
- Communicating relevant information or changes in status of pending business to producers;
- Managing detailed information on WealthServ for efficient tracking and measurement of business and processing performance;
- Assisting Advisors in ordering medical requirements when required;
- Assisting in the management of the new business email inbox on a rotation basis;
- Assisting in managing the various carrier websites and updating client files; and
- Processing field underwriting and procedural inquiries from Advisors.

*Processing – In Force/ Policy Service –*

- Reviewing and processing In Force policy service requests;
- Working closely with each carrier to ensure a timely decision/approval;
- Communicating all updates from carriers to the Advisor;
- Processing “non underwriting” policy service requests; and
- Fielding Advisor inquiries regarding policy service issues and adhering to the service level standards for each Advisor group.

*Other Responsibilities –*

- Communicating with the Department Head regarding all internal and external issues;
- Assisting with other administrative tasks as needed; and
- Assisting with reception duties when required.

**JOB SPECIFICATIONS:**

- Post-secondary education
- Completion of LOMA courses (i.e. FLMI, ACS) considered an asset
- 3 years+ experience working in a customer service environment
- Strong knowledge of MSWord, Excel, Outlook, PowerPoint
- Experience with WealthServ and asset
- Ability to work effectively and efficiently in a team environment
- Excellent oral and written communication skills and strong negotiation skills
- Detail-oriented with high degree of accuracy

- Ability to multi task and process in a timely manner and meet deadlines
- Organized with the ability to prioritize workload
- Strong problem solving abilities

**COMPENSATION:**

Commensurate with experience

*If you are interested in applying for this position, please forward a cover letter and resume in confidence to [hr@worldsourcewealth.com](mailto:hr@worldsourcewealth.com).*

*Worldsource is committed to accessibility in employment and to ensuring equal access to employment opportunities for candidates, including persons with disabilities. In compliance with AODA, Worldsource will endeavour to provide reasonable accommodation to persons with disabilities in the recruitment process upon request. If you are selected for an interview and you require accommodation due to disability during the recruitment process, please notify the hiring manager upon scheduling your interview.*

*We thank all applicants for their interest but only those selected for an interview will be contacted.*