

## SUN LIFE FINANCIAL ADVISOR - Role description

Financial advisors love to build long-term relationships with people and help them plan financially for the various stages of life. They make an impact in their communities providing advice and implementing recommendations in a purpose-driven career with opportunities for unlimited income potential, independence, and growth.

People from various professional and educational backgrounds have found success in the advisor career at Sun Life. That's because being a successful advisor is not just about what's on your resume. It's about who you are as a person.

Are you someone who loves talking to people and comfortable providing advice?

- Are you disciplined and motivated?
- Do you value your independence?
- Do you love learning and developing new skills?

If this sounds like you, let's talk!

### What's in it for you?

- **Unlimited earning potential** with compensation that is tied to your achievements and provides an ongoing stream of income.
- "Earn while you learn" **monthly bonuses** to provide financial stability as you develop your skills in a new career.
- A **purpose-driven career** helping people in your community become more financially secure.
- The **independence** and **flexibility** to build your work around the important things in your life.
- Hands-on dedicated **local support** to help you develop the skills to successfully launch, develop, and grow your business.
- A **recognition program** that celebrates your achievements through prizes and travel incentives including Conventions, Learning Retreats, Awards of Excellence, and stock ownership.
- **Leading-edge technology** so you can do business easily anytime, anywhere.
- A **culture** that celebrates excellence and inclusivity.

### What does a financial advisor do?

Here are some of the more common activities performed by successful financial advisors:

- Prepare and execute strategies to attract and connect with new Clients.
- Conduct meetings with prospective and existing Clients.
- Review their current financial state and gather information about their future goals.
- Build a financial roadmap to help them achieve these goals.
- Recommend and implement suitable insurance and investment products that align with this financial roadmap.

- Continue to meet with Clients to ensure their plan stays up to date as their life situation changes (family, career, housing, debts, etc.)
- On-going training and professional development to remain current with industry changes.
- Obtain professional accreditations and designations throughout their career (such as Certified Financial Planner – CFP).
- Stay connected within their community through ongoing networking activities, marketing, and referrals.

## **The person we are looking for:**

- Has a history of achievement (professional, academic, athletics, etc.).
- Enjoys engaging, developing, and maintaining relationships with people.
- Is disciplined and self-motivated.
- Is goal-oriented with a strong work ethic.
- Is a continuous learner with a deep interest in helping others.
- Has excellent communication skills.
- Has a College/University degree and some professional experience.

## **Assets (optional):**

- Demonstrated ability to motivate others to action.
- Business development skills.
- LLQP and/or Mutual Fund license or course/exam completion.

**Become a Sun Life advisor to take control of your future in a purpose-driven career helping individuals, families, and business owners in your community achieve lifetime financial security and live healthier lives.**

To learn more and APPLY at [www.sunlife.ca/becomeanadvisor](http://www.sunlife.ca/becomeanadvisor)

*To be contracted as a Sun Life advisor, you must be legally entitled to work in Canada. Sun Life will not sponsor your application for authorization to work in Canada, including for a work permit or to apply for permanent residency.*

*The Sun Life advisor role is 100% commission-based. The possible salary disclosure provided by this job board does not apply.*