

Leading Advisor Hiring System

These are the steps and explanations of the Leading Advisor Hiring System:

1. Needs Analysis

- We conduct an interview with you to gain an understanding about the candidate that you wish to hire.

2. Job Assessment

- We provide you with an On-Line Assessment to assess the behaviours and characteristics of the position that you wish to hire for so that we have a benchmark to work with when we assess the final candidate for the position to guarantee a right fit hire for your position.

3. Job Description

- The Needs Analysis and the Job Assessment provide you with the insight to write a Job Description or we can write the Job Description for you. Please see examples below of Job Descriptions.

4. Ad For Position

- The Needs Analysis, the Job Assessment and the Job Description provide you with resources to write an Ad For The Position so that you receive Resumes by e-mail only. We can write the Ad for you. Please see below for examples of Ads.

5. Resume Review & Recommendations

- You review the Resumes and shortlist them or the Ad can be created with the Resumes coming to Leading Advisor so that we can do the short listing for you.

6. Unqualified Resumes

- Please see examples of responses below that is sent to unqualified Applicants.

7. E-Mail Interview Questions

- Please see below for examples of E-Mail Interview Questions. Leading Advisor can shortlist the candidates based on the E-Mail Interview Questions.

8. Qualified Candidate Telephone Interview Questions

- Please see below for examples of the Qualified Candidate Telephone Interview Questions. Note that Live Interviews have not taken place as yet. Leading Advisor can shortlist the candidates based on the Qualified Candidate Telephone Interview Questions.

9. Qualified Candidate Live Interview

- Conducted by you at the location of your choice.

10. Values & Behaviours Assessment

- Completed by Leading Advisor

11. Values & Behaviours Assessment Debriefing

- Completed with you by Leading Advisor to guarantee a right fit hire for your position.

12. Reference Checking

- We suggest subcontracting this out to a Specialty Firm.

13. Hire

Examples of Job Descriptions

Example #1

Executive Assistant / Office Manager Position

Primary Duties and Responsibilities:

_____ is currently hiring for the position of Executive Assistant / Office Manager to perform a range of duties including, but not limited to:

Responsibilities:

- Booking travel; handling all arrangements; verifying travel and event details
- Client follow up for event details required
- Mastering a tracking system to keep track of time sensitive events
- Scheduling Client conference calls
- Ordering books, shipping supplies in advance of events; processing and shipping online orders
- Data entry and upkeep of the company's database, ensuring a high level of accuracy
- Payroll and CRA monthly payments; providing information to Bookkeeper monthly
- Receivables, payables, invoicing, tracking payments, banking, account reconciliation, credit card transactions
- Managing special projects and events
- Monitoring online presence, to include website, Google alerts, responding to blog and twitter mentions
- Handle general inquiries

Qualifications

Knowledge, Skills and Abilities

- Completion of high school and administrative training or equivalent work experience
- Excellent command of English to be able to speak, read, and write fluently
- Dedication to detail and accuracy
- Ability to follow directions and work with minimum supervision; take ownership of assigned tasks, and think for themselves
- Excellent administrative, time management, and organizational skills

Proficiency in the use of computer programs for:

- Microsoft Office Suite (Word, Outlook, Excel, PPT)
- Familiar with; ACT!, Google Calendar, Google Docs, Expression Engine, PayPal,

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- Tripit, Dropbox, iContact or equivalents
- Basic knowledge of bookkeeping processes and software (QuickBooks)
- Internet savvy

Personal characteristics

The Administrative Assistant will demonstrate competence in the following areas:

- Relationships: Maintain positive working relationships with others, both internally and externally
- Communication: Excellent listening skills, oral and written communication skills
- Needs Assessment: Anticipate, understand, and respond to the needs of their employer and the clients to meet or exceed their expectations
- Teamwork: Follows direction well, work cooperatively and effectively with others to set goals, resolve problems, and make decisions to enhance company's effectiveness; ability to undertake self-directed tasks when necessary
- Organization: Excellent time management skills; excellent attention to detail; the capacity to prioritize by assessing situations to determine urgency; ability to develop a work schedule, and ability to make clear and timely decisions

Working Conditions

- To commence, the Executive Assistant will work onsite in our office
- Part time work, approximately 3 days per week
- Salary will reflect experience and qualifications – ranging from \$18 - 23 / hour
- This is a nonsmoking office
- References are required

Example #2

Receptionist / Administrative Assistant

Company Overview:

Over the last 20 years, _____ has developed a strong reputation in financial planning and insurance consulting, both here in _____ and across _____. We endeavor to offer a comprehensive range of financial services, including the management of individual insurance plans and investment portfolios; the development of executive benefits plans and corporate buy/sell agreements; and the administration of group benefits/pension plans. Our ability to provide superior guidance is evident from our prestigious list of clients.

The *Receptionist / Administrative Assistant* position is an excellent entry level opening for our company. This role will provide you with exposure to a wide variety of tasks, as listed below.

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Duties:

- Answer the telephone and direct incoming calls to the appropriate person
- Open and sort incoming mail and couriers; prepare outgoing mail and couriers
- Basic day-to-day banking / payables / postage
- Maintain inventory of stationary supplies
- File client statements and correspondence
- Keep the office clean & orderly
- Ensure office equipment (printers, phones, computers) function properly
- Assist the President with personal errands, travel plans, and organization
- Provide administrative support for the Insurance, Group Benefits, and Investment departments, as required
- Assist with the implementation of marketing programs. This will include researching prospective clients and sending out marketing communications.
- Organizing client events and arranging for client gifts

Qualifications:

- Training in Word, Excel, and PowerPoint
- A pleasant telephone manner and upbeat personality
- Excellent English skills (verbal and written)
- Very strong organizational skills and the ability to work with minimal supervision
- A "can-do" attitude and enthusiasm to assist on a wide range of projects
- Experience in arranging travel plans and event planning would be a valuable asset

Compensation:

- Salary of \$30,000 - \$32,000 per year
- Vacation of two weeks per year
- Participation in the Group Benefits Program after 3 months of employment.
- Educational Expenses – 100% for approved insurance, benefits, and financial related courses.
- Hours 8:30am to 5:00pm

Example #1

Group Account Manager

Duties include:

- Independently manage small group accounts, providing support to employers and their plan administration / payroll team.
- Prepare applications and enrollments for new cases, and coordinate with the carrier and client in launching the program.
- Process annual renewals, including negotiations with the carrier; assessment of the current plan design and claims trends; preparation of the renewal reports; and attending renewal meeting with the client.
- Review claims trends throughout the year and send the client semi-annual

updates.

- Respond to inquiries from plan administrators and plan members by phone, mail or email in a timely and professional manner.
- Review of new business quotations and preparation of proposals for prospective clients.
- Coordination with carriers regarding plan amendments, billings and member enrollments.
- Participation in employee / plan administration training sessions.
- Management of special assignments and group benefits marketing campaigns.

Qualifications:

- Minimum of three years of group account management experience
- Bachelor's Degree in Business / Finance, or College Diploma in Financial Services
- Proficient in Word, Excel, PowerPoint and high aptitude for learning new software
- Excellent command of English (verbal and written)
- Motivated, quick learner who works well individually as well as a member of a team
- Able to manage multiple tasks with a high level of accuracy
- Excellent problem solving and organizational skills
- Superior communication skills
- Outstanding organizational and time management skills
- Detail oriented and a team player
- Able to work with minimal supervision and multitask
- "Can-do" attitude and enthusiasm
- Initiative and willingness to learn and take on new tasks
- Able to meet deadlines and work under pressure
- Life licence and GBA designation is an asset

Example #1

Group Client Services Specialist

Duties include:

- Responding to inquiries from plan administrators and plan members by phone, mail or email in a timely and professional manner.
- Review of new business quotations and preparation of proposals for prospective clients.
- Preparation of applications and enrollments for new cases to be submitted to the carrier.
- Coordination with carriers regarding plan amendments, billings and member enrollments.
- Preparation of client renewal reports.
- Creation of employee presentation materials.
- Coordination for special assignments and group benefits marketing campaigns, as needed.

Qualifications:

- Bachelor's Degree in Business / Finance, or College Diploma in Financial Services
- Previous customer service and group benefits experience preferred
- Proficient in Word, Excel, PowerPoint and high aptitude for learning new software
- Motivated, quick learner who works well individually as well as a member of a team
- Excellent command of English (verbal and written)
- Able to manage multiple tasks with a high level of accuracy
- Excellent problem solving and organizational skills
- Superior communication skills
- Outstanding organizational and time management skills
- Detail oriented and a team player
- Able to work with minimal supervision and multitask
- "Can-do" attitude and enthusiasm
- Initiative and willingness to learn and take on new tasks
- Able to meet deadlines and work under pressure
- GBA, Life license or nearing completion of LLQP Exam is an asset

Examples of Ads for Position

Example #1

Sales Assistant to Senior Financial Advisor

For Industry Leading Independently-Owned Full Service Brokerage Firm

The successful candidate must:

- have successfully completed the required Securities Course and be fully licensed with current Investment Advisor qualifications.
- be an enthusiastic team player with exceptional telephone, communication, and interpersonal skills building team and client relationships.
- have the ability to quickly adapt to ever changing priorities relating to accounting, marketing, quotes/transactions, scheduling.
- have high standards and attention to detail while following procedures dealing with large volumes of paperwork.
- have the ability to solve problems quickly and independently.
- have proficient computer skills.

Salary 35-40 K. Bonus pkg. neg. Please reply in confidence with salary expectations; e-mail or fax your cover letter and resume to: _____

Example #2

Group Insurance Administrator

_____ is an established financial planning firm, servicing _____ clients with employee group benefits, individual insurance and money products. We are looking for a part-time Group Insurance Administrator who is eager to establish their career with a financial planning firm.

The Group Insurance Administrator will be a dynamic team player with exceptional telephone, communication and interpersonal skills; work well independently; adapt quickly to ever changing priorities; have high standards and attention to detail; have proficient computer skills including MS Office and Simply Accounting; have previous customer service experience, and post-secondary education.

This is a part-time opportunity offering a competitive salary, yearly bonuses and group coverage. Please reply with cover letter stating salary expectations and resume to: _____

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Example #3

Executive Assistant – Financial Services Firm

We are a financial services firm located in _____ and we are looking for an exceptional assistant to join our team. You are a dynamic team player with exceptional communication, organizational, and interpersonal skills, and you are customer service oriented. You work well independently, are flexible, can prioritize, and manage a complex workload. You have high standards and attention to detail and are MS Office proficient.

Please reply with cover letter stating salary expectations and resume to: _____ . Only those applicants selected for an interview will be contacted. No telephone calls or recruitment agencies will be accepted.

Communication to Send via Email for Qualified Resumes

Dear _____,

Thank you for your interest in the position of _____ with _____.

We find your job experience and qualifications to be a potential good fit for the position and we want to move ahead and engage you in our Hiring Process. Leading Advisor, Inc. is working in conjunction with our client, _____, and we are managing the recruitment and selection process of the _____ position.

To follow is an outline of our Hiring Process:

- Review of resumes and shortlist.
- E-mail sent to short listed candidates with a request for the candidate to review and complete a set of questions, and return completed questions via email.
- Second short list completed.
- Telephone interview scheduled based on qualifications, experience, and answers to questions.
- Values & Behaviors Assessment to be assigned and completed via email by short listed candidates.
- Third short list completed.
- Reference checks conducted.
- Live interview.

Following this email, I will send you a second email containing a set of questions that you can complete and send your completed questions to me via email.

Please respond to this email to acknowledge receipt.

Should you decline involvement in our Hiring Process, please kindly reply to this email acknowledging that you are not interested in moving forward.

Best regards,

Communication to Send via Email for Unqualified Resumes

Example #1

Subject: Thank you for your interest in the position

Dear _____,

Thank you again for your interest in the position with _____.

This email is to advise that you have not been short listed for the position.

We wish you success with your job search in the future.

Regards,

Example #2

Subject: Thank you for your interest in the position

Dear _____,

Thank you very much for submitting your resume, and for your interest in our position.

We have successfully filled the position, but I will keep your material on hand.

Thank you very much for your time and good luck with what you are doing.

Best regards,

Examples of E-Mail Interview Questions for Qualified Candidates

Thank you once again for your interest in the position of _____ with _____. As outlined in a summary of our hiring process, please find a few questions below. Please send your answers to my attention, by _____.

1. What aspect of the job posting interested you the most?
2. What are you looking for in your next position?
3. Of all the work you have done, where have you been most successful? Why?
4. Where have you been the most fulfilled? Why?
5. What personal qualities do you think are necessary to make a success of this position?
6. What would you say are the broad responsibilities of this position?
7. What is your ideal office environment? What is your preferred style of working? (example - deadlines, fast pace, predictable, organized)
What would you change about your current job, or your most recent job? What aspects of it do you like the least? What do you like the most?

Examples of Telephone Interview Questions for Qualified Candidates

Ability/Suitability

- Where do you see yourself professionally in 2 years?
- What are you looking for in your next position?
- What aspects of your last job gave you the most enjoyment?
- What aspects of your last job caused you the most problems?
- Tell me about a time when the boss was absent and you had to make a decision.

Flexibility/Stress

- How many projects can you handle at a time?
- How do you prioritize your projects?

Planning/Organization

- Describe your method for keeping track of important matters.
- How do you plan your day?

Teamwork

- How do you establish a working relationship with new people?
- What kind of people do you like to work with?
- What kind of people do you dislike to work with?

Manageability

- How would your boss get the best out of you?
- How would you get the best out of your boss?
- How do you react to criticism?
- How do you take direction?
- Tell me about the kind of rewards that make you feel adequately recognized for your contributions.

Do you have any personal commitments that I should be aware of?

What can you do for us that someone else cannot do?

What special characteristics should I consider about you as a person? OR

Is there anything else that you would like me to know?

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