

◀ GROW WITH US ▶

Grandtag Financial sees the necessity of reforming clients' experience in Financial and Tax Planning services.

We are seeking **11** high-quality candidates for **5** key roles to power business success.

Please refer to the job title for more information, and apply the position if you are eligible.



2nd Floor, 8171 Ackroyd Rd.
Richmond V6X 3K1
Phone No: (604) 278 0122
Email your Resume to
apply positions:
Career@grandtag.ca

Trade Show Promoter

Our Showroom in Metrotown will provide an opportunity for clients to learn about strategic Financial & Tax Planning with prestige value in a relaxed environment. This innovative business idea for our company is quite different than the traditional selling mode. Your main goal will be to help us "promote" appointments from Showroom or Seminar with our expert Financial Advisors. We'll train you on marketing, communication and follow up skills.

Job Duties

- Enthusiastically represent us at showroom
- Collect contact information from potential clients or schedule appointments for them with our Financial Advisors.
- Submit report for potential clients
- Provide visitors to our showroom with a remarkable experience

Requirements

- Some experience in marketing or promotions preferred (not required)
- Effectively demonstrate and communicate to prospective customers
- Ability to communicate in Cantonese or Mandarin an asset
- A passion for connecting with people

Remuneration & Benefits

- Subject to qualifications and experience
- Health & dental benefits available
- Career opportunities to develop into management role
- Base salary \$36,000+target bonus \$24,000

Accounting / Administrative Clerk

We believe a sophisticated candidate should be persistent and humble who can also present themselves as a trustworthy team member rather than appeared capable of doing things. The ideal applicant will be coached to be a confident person with the ability to communicate effectively.

Job Duties

- Calculation of Income and expense statements.
- Processing new business and following existing business
- Liaising with carriers, agents and vendors
- Document review and Data input

Requirements

- 5 plus years of working experience
- Proven written and communication skills
- Proficiency in Simply Accounting and MS Excel is an asset
- Ability to communicate in Cantonese or Mandarin is an asset

Remuneration & Benefits

- Subject to qualifications and experience
- Health & dental benefits available
- Career opportunities to develop into management role
- Base salary \$40,000-\$50,000

Sales / Personal Assistant

Being a financial advisor can be one of the most demanding job. The challenges that financial advisors face today are the need of the professional knowledge in finance and the ability to attract quality clients. As a Sales Assistant, you will be responsible to supporting the Financial Advisor in achieving business objectives of profitability, and market share. In the meantime, you will have the opportunity to grow in your own career path as a financial advisor.

Job Duties

- Assisting financial Advisors and clients in order to help them achieve what they need.
- Arranging appointments with prospects and clients for Advisors
- Coordinate marketing activities
- Be an integral team member responsible for keeping team organized and driving client satisfaction

Requirements

- Prospecting and creating sales within the events
- Experience of phone and sales skills
- Financial Industry experience an asset
- Ability to communicate in Cantonese or Mandarin an asset

Remuneration & Benefits

- Subject to qualifications and experience
- Health & dental benefits available
- Career opportunities to develop as a financial advisor
- Base salary \$36,000 + target bonus \$24,000