



Associate, PRT Onboarding and Client Experience - Operations Toronto, Ontario

Blumont Annuity Company, formerly known as Brookfield Annuity Company, is a life insurance company licensed in 2016. We are the only Canadian life insurer that is primarily focused on providing annuity solutions to defined benefit pension plans, associations and individuals across Canada. The company has experienced exponential growth since inception, ranking 2nd in group annuity sales in 2024 and is well-positioned for long-term success.

For more information about Blumont Annuity Company, visit our website at www.blumontannuity.ca.

Blumont Annuity Company is wholly owned by Brookfield Wealth Solutions Ltd. ("BWS"). BWS is focused on securing the financial futures of individuals and institutions through a range of retirement services, wealth protection products and tailored capital solutions. Through its operating subsidiaries, BWS offers a broad range of insurance products and services, including annuities, personal and commercial property and casualty insurance and life insurance.

Blumont Annuity Company is seeking an **Associate, PRT Onboarding and Client Experience** to join our Operations team, reporting directly to the Director, PRT Operations, Onboarding & Client Experience. In this role, you will lead the client activation process for recent client acquisitions, ensuring a thorough understanding of the complexities of the new business and ensure that internal teams, intermediaries, clients and annuitants' interests are protected. Your key responsibilities will include project coordination and delivery, data reconciliation, annuitant communication, fostering relationships with large consulting firms, clients, and outsourcing partners. We are looking for a dynamic, solution driven, quality-conscious, client-focused individual who can learn quickly and thrive in our growing business.

Responsibilities:

- Oversee the coordination of multiple onboarding processes to ensure seamless transitions.
- Establish data requirements, review welcome packages, and manage client expectations.
- Understand client specific needs and manage pension complexities through collaboration.
- Ensure that the new business is set up for success in ongoing error-free ongoing operations.

Required Skills:

- Experience in pension plan and/or group annuity administration
- Strong client relationship management skills
- Excellent oral and written communication skills in English and French
- High proficiency in data literacy and analytical thinking
- Strong attention to detail, accuracy and resourcefulness
- Advanced Excel skills and experience with large datasets, with proficiency in Microsoft Office

Education

- Bachelor's / University degree or equivalent experience
- PPAC and/or CEBS and/or ASA
- Bilingual skills are preferred

Please email your application to careers.canada@blumontannuity.com. Please include your resume and any covering comments you wish to provide.

All applicants must be legally eligible to work in Canada. Employment is contingent on the satisfactory completion of pre-employment background and reference checks.