



Certified Financial Advisor, BMO Insurance

Posted by BMO Financial Group

Posting Date : 25-Feb-2026

Closing Date : 24-Aug-2026

Location : Montreal

Salary : \$\$43,200–\$80,000 Per Year

Job Requirements

- **Education:** Post-secondary education
- **Language:** English
- **Years of Experience:** 2 years
- **Vacancy:** 2
- **Job Type:** Full Time
- **Job ID:** DISJ6627767

Job Description:

Complete job description

VIRTUAL(R)61-QC-BMO XXXXX, REMOTE/TELETRAVAIL, X0X 0X0

We are assembling a pool of applicants for upcoming positions.

uses a consultative, client-first approach to identify insurance requirements and provide customized solutions by promoting and selling insurance products and solutions via both inbound and outbound channels. increases revenue and achieves personal goals. provides clients and prospects with the ideal customer experience.

maximizes possibilities with every customer to improve cross-selling sales activities, referrals, and client retention, which speeds up premium growth.

complies with the approved scripts, procedures, and processes that are used while carrying out company operations.

oversees high-end sales and complicated situations.

offers excellent customer service and experience.

develops solutions and offers suggestions based on knowledge of stakeholder demands and corporate strategy.

gives the designated company or group direction and advise on how to execute solutions.

Obtains and/or maintains the necessary licenses for the goods and markets in which the position is carried out; fulfills the criteria of the Errors & Omissions Insurance and Continuing Education programs as instructed.

collaborates with internal and external partners to support the implementation of strategic goals.

guarantees alignment and cultivates productive connections with internal and external stakeholders.

breaks down strategic issues and evaluates data and information to provide suggestions and insights.

In order for the licensed agents to carry out their responsibilities, you must respond to technical inquiries about life insurance.

guarantees the prompt creation of training, complaint handling, and program scripting.

guarantees that all legal and regulatory requirements pertaining to sales are satisfied.

determines the requirements of the company, creates training programs and tools, and sometimes even conducts audience training.

encourages the business plan's accomplishment.

encourages the provision of the ideal customer experience in order to improve commercial prospects.

works well with internal stakeholders to increase corporate growth and capabilities.

respects all legal and regulatory standards while carrying its company operations.

fulfills given administrative tasks, such as following up on unfinished business and completing sales reports.

A company or organization may be the focus.

innovates and comes up with fresh ideas.

uses judgment to recognize, assess, and resolve issues within predetermined parameters.

mostly operates on their own.

As appropriate, broader tasks or responsibilities may be delegated.

Requirements:

A post-secondary degree in a relevant area of study and at least two years of experience as a licensed insurance advisor are prerequisites.

The team, department, or jurisdiction where the mandate is being carried out must have the necessary licenses and certifications.

A license for insurance of persons is necessary.

A license for damage insurance is advantageous.

proficiency in both French and English.

Preferably, you have prior call center experience.

practical understanding of life insurance products; application of life insurance products; and knowledge of life insurance laws, rules, and compliance.

specific expertise gained via school and/or professional experience.

Comprehensive writing and verbal communication abilities.

Comprehensive teamwork and collaboration capabilities.

Comprehensive analytical and problem-solving abilities.

In-depth influence talents.

Since this position involves supporting customers and team members both within and outside of the province of Quebec, you speak French and English well.

Pay: \$80,300.00 to 43,200.00

Type of Pay:

Paid

The salary range and type for BMO Financial Group are shown above.

Salary ranges may include a commission structure and will depend on a number of criteria, including location, education, experience, talents, and suitability for the position. The amount of hours consistently worked will determine the prorated salary for part-time positions. The aforementioned compensation is BMO Financial Group's anticipated goal for commission positions during the first year of employment.

Depending on the pay type of the role, BMO Financial Group's overall compensation package may include discretionary bonuses, performance-based incentives, and other benefits and prizes. In addition, BMO provides retirement savings programs, health insurance, accident and life insurance, and tuition reimbursement. Visit <https://jobs.bmo.com/global/en/Total-Rewards> to learn more about our perks. About Us at Our common goal at BMO is to "boldly grow the good in business and life." It challenges us to bring about long-lasting, constructive change for our clients, communities, and citizens. We change lives and companies and fuel global economic development by collaborating, inventing, and pushing limits.

You have more opportunities to develop and have an influence as a part of the BMO team because you are respected, listened, and appreciated. From the beginning, we want to assist you in making a difference for both our clients and yourself. As you assist our clients in reaching their goals, we will provide you with the resources and skills you need to accomplish new ones. We'll assist you in expanding your skill set and gaining useful experience via anything from comprehensive coaching and training to management assistance and networking opportunities.

Visit us at <https://jobs.bmo.com/ca/en> to learn more.

BMO is dedicated to creating a workplace that is accessible, fair, and inclusive. We are strengthened by our people and our viewpoints when we learn from each other's diversity. Candidates who participate in every step of the screening process might seek accommodations. Please get in touch with your recruiter to seek accommodations.

Recruiters should be aware that BMO only accepts resumes from candidates directly. Any unsolicited resumes that are provided to BMO—directly or indirectly—will be regarded as BMO property. Any placement that results from receiving an unsolicited resume will not incur a

charge from BMO. Before accepting resumes, a recruitment agency must have a legally binding, fully negotiated agency agreement contract.

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