



Example of Bilingual Advisor Job Description

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Our company is growing rapidly and is looking to fill the role of bilingual advisor. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

Responsibilities for bilingual advisor

- Educates customers on products and services that are relevant to their needs
- Maintaining up-to-date knowledge of all SOBRA program policies and procedures and the SIS/MIS information system
- Analysis of financial information and assisting with financial decisions to help clients plan for short and long term savings and investment goals
- Suggest improvements to company processes (e.g., website, FAQ, UI/UX, back office procedures)
- Representatives will help prospects/clients/members develop financial goals
- Work in a fast-paced contact center environment, engages authentically with business and residential customers who look for expertise, solutions and advice on their electric utility services
- Make decisions and recommendations based on knowledge of and interpretation of pre-established policy and precedents
- Successfully meets or exceeds performance-based goals
- Proactively build managers' capabilities through roundtables, information sessions, just in time coaching, and broad communications so that they are empowered to effectively handle employee situations
- As Bilingual Private Banking Associate/Client Care Advisor hybrid role, you will meet with all new clients and outline how the PBA role provides support as part of the relationship team

Qualifications for bilingual advisor

- We are looking for Both French Bilingual and English only candidates for our current hiring needs
- Qualified candidates must be able to successfully obtain a General Insurance License for Ontario (and other provinces) to begin work in this position (full training will be provided to assist you in reaching this goal)
- All the tools, training, and team support you need to grow your business and career
- Strong relationship-building and collaboration skills are required
- A supportive, dynamic culture where you can grow your career and be recognized for your talent
- Create a legendary customer experience at every interaction and look for ways to contribute to on-going improvement of the overall customer experience