



The Manufacturer's Life Insurance Company (Bermuda Branch)

The Manulife Bermuda Branch was created to address the estate preservation and insurance needs of high net worth clients. The Branch caters specifically to distribution partners in the International High Net Worth Life Insurance market.

Senior Compliance Consultant

The International Life Compliance team including the Senior Compliance Consultant provides compliance support to the Manulife Bermuda Branch. The Senior Compliance Consultant works closely with internal customers including Bermuda Branch management and staff, the law department, and other compliance teams. This individual will be involved in and responsible for various compliance functions and initiatives supporting the Manulife Bermuda Branch.

Accountabilities:

- Capable of handling very advanced compliance work including AML/ATF, privacy, anti-fraud
- Develops and implements policies & procedures that enable the business to remain in compliance with regulatory requirements
- Manages tight deadlines and address urgent cases and escalations
- Conducts enhanced due diligence reviews
- Prepares required reporting as needed
- Works with regulators as needed
- Coordinates and performs analysis on complex concepts that may require in-depth research and interpretation
- Establishes and maintains strong working relationships with the business and compliance teams
- Collaborates with all areas of the organization to ensure compliance needs and business goals are met
- Works with team members to ensure a cohesive unit and to provide consistent, high-quality work, including working effectively with colleagues in remote locations
- Creates and provides compliance training
- Ad hoc tasks and project work as required

Qualifications:

- College/University Degree or equivalent experience
- Minimum 5 years of related financial services or compliance experience
- Excellent organizational and time management skills
- Ability to multi-task and manage competing priorities, ensuring all items handled timely
- Excellent written and verbal communication skills
- Strong ethical compass
- Excellent analytical and problem-solving skills
- Independent, with the ability to take accountability for actions
- Advanced understanding of the regulatory environment in which the Company operates and a strong understanding of key compliance requirements applicable to the business.
- Strong interpersonal and leadership skills
- Experience with the Bermuda Monetary Authority is preferred

Case Manager

Reporting to the Director, International Operations, this position is based in Bermuda and focused on the day-to-day operations of the office. This is a small office with approximately 8 members on staff. The incumbent will work independently most of the time and will manage process and some projects within the office. This individual will work closely with Underwriting, Issue and Billing, Distribution, Product, Marketing and other internal departments.

Accountabilities:

- Act as a primary contact for distributors, ensuring their needs are met
- Sales pipeline management, ensuring system data is accurate for reporting purposes
- Manage tight deadlines and address urgent cases and escalations
- Work with other team members to ensure a cohesive unit and to provide consistent, high quality service, including working effectively with colleagues in remote locations
- Actively participate in the continuous improvement of business processes, identifying ways to streamline processes and reduce internal handoffs
- Proactively work to identify and correct complex issues, resolve complaints and concerns, and coordinate with other staff and departments as required
- Oversee tracking of policy issue and contract delivery, proactively identifying periods of high volume and helping where needed
- New Business procedure updates and maintenance
- Manage administrative aspects of new cases from submission to issue, ensuring service levels (time and quality) and customer needs are met, including:
 - Preparing cases for policy issue, ensuring documents are in good order
 - Tracking wire transfers and initiating deposit requisitions for premium application
 - Initiating reinsurance review with reinsurers on facultative cases
 - QC on policy contracts prepared by Assistant Case Manager
 - Invoicing for medical fee reimbursement requests
 - Backup support for Titles team, including review of application documents and forms, reviewing trust and PIC structures for policy ownership, reviewing collateral assignments
- Ad hoc tasks and project work as required

Qualifications:

- Excellent customer service and communication skills, with a solid understanding of urgency and strong follow-through
- Ability to build and maintain positive & solid relationships with internal and external customers
- Excellent organizational and time management skills, with high attention to detail
- Ability to multitask and prioritize under stressful and changing circumstances
- Understanding of compliance and AML/ATF requirements, including client risk assessment
- Strong technical competence with systems/databases/Microsoft office, including ability to work in multiple systems
- Flexible work hours, understanding in periods of high volume that additional time commitment may be required
- Able to work in a small, quiet environment
- Sensitivity and adaptability to international and cultural differences
- Appreciates the confidentiality involved in a high net worth/client focused environment
- Independent, with the ability to take accountability for actions
- Ability to navigate and work in 'grey' areas with little direction
- Ability to multi-task and juggle competing escalated inquiries, prioritizing workload based on urgency, ensuring all items handled in a timely manner

Experience/Education:

- Post-secondary degree
- Minimum 3 years previous life insurance industry knowledge with knowledge of New Business policies and procedures, or previous experience working in Distribution/Sales
- Life insurance exams/designations an asset - LOMA 1 & 2, ACS. Otherwise willing to complete within 2 years

Interested candidates should submit resume with a covering letter to Manulife Bermuda, Attention: Carolyn Macdonald, Maxwell Roberts Building, 4th Floor, One Church Street, Hamilton HM11 or email: cmacdonald@jhancock.com

Closing date: July 15, 2019