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## Candidate Brief

### Medical Assurance Society (MAS) – Adviser

5 October 2020

The information contained in the Candidate Brief is to assist candidates in their evaluation of the suitability of the advertised role. Decipher Group Limited accepts no liability for information provided, on behalf of the client, in good faith.

**decipher** the people you need to succeed

## About the company

We have an exciting opportunity for a passionate Financial Adviser to join the MAS (Medical Assurance Society) team within the Canterbury Region.

MAS is a Member based organisation that works primarily with the professional market including Doctors, Dentists, Vets, Accountants, Solicitors, Architects and Engineers.

## About the opportunity

The successful candidate would have a genuine passion for the financial services industry. They would be confident and self-driven with a commitment to assist our members, offering high quality financial advice, detailed personal protection plans and responsible retirement options.

## About you

You will be conscientious, enjoy a flexible and friendly working environment, and have strong relationship management skills.

We would expect the applicant to be in a similar role currently with at least 2 years' experience in the insurance and/or finance industry. Ideally you would hold a National Certificate in Financial Planning or similar.

We are looking for the following key attributes:

- A true passion for meeting new people
- An absolute commitment to great member outcomes
- An innate excitement to develop strategies to gain new membership
- Keenness to attend networking functions, MAS Member events and present to groups

We need somebody to be the face of MAS therefore the role will be mobile and will require the flexibility to work out of normal business hours.

MAS is 100% New Zealand owned and operated. We are a national provider of financial services including personal and business protection as well as superannuation and retirement planning. We have achieved and maintained an A- rating from Standards and Poor's and pride ourselves on our long and successful history of serving the financial needs of our niche market of professionals. For further information about MAS, you can visit our website [www.mas.co.nz](http://www.mas.co.nz).

## How to apply

To discover more about MAS, visit [www.MAS.co.nz](http://www.MAS.co.nz)

For a confidential discussion about the role, contact Julia Hetherington on 021 193 9219 or [julia@deciphergroup.co.nz](mailto:julia@deciphergroup.co.nz).

Applications close: Monday 19<sup>th</sup> October 2020

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## MEDICAL ASSURANCE SOCIETY

### ROLE DEFINITION

Position Title:	Adviser
Business Unit:	Sales
Date:	October 2020

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#### About MAS

Having highly satisfied Members is Medical Assurance Society (MAS)'s most important business objective. To achieve this, we need to deliver exceptional service and advice to MAS Members. In addition, we must also continue to grow and develop our staff.

MAS's accomplishments are the work of its staff. We encourage initiative, recognise individual and team contributions, treat each person with respect and fairness, and provide opportunity for individual growth. Our staff must exhibit the highest levels of professional and technical competence. At MAS, we value people who are brave, have fun, just do it, respect others, are honest and work with integrity, show initiative and are loyal.

#### Sales overview

The Sales team is responsible for providing sales and service to existing and prospective MAS Members. Particular functions include:

- Providing information and advice about MAS's products and services – specifically personal insurance, investments and superannuation, and banking relationships.
- Actively seeking new MAS Members, with a focus on building and maintaining relationships.
- Maintaining and strengthening relationships with existing MAS Members and continuing to fulfil their requirements for financial advice in relation to Life, Disability and Retirement Planning products and services.
- Supporting promotional and sponsorship events.
- Providing advice and having input into projects led by other MAS business units that have a bearing on Members' experiences with MAS.

#### Adviser Position Purpose:

- Developing and implementing sales strategies to help as many Members as possible, ensuring sufficient personal covers and retirement savings are in place.
- Supporting Member relationships to enhance the association they have with MAS.
- Identifying, meeting with and acquiring new Members, contributing to membership growth in region.
- Undertaking a review of identified Members, to ensure the Member has the appropriate personal covers and retirement savings for their needs.
- Providing quality financial and business advice and product quotations to Members on all MAS products and services.

- Selling and promoting products and services to ensure collective targets are met.
- Attending social and networking events and promotions to represent MAS and enhance its reputation among existing Members and prospective new Members. This includes proactively promoting any events to Members when conducting personal reviews.
- Undertaking relevant training and development as required by MAS or the industry.
- Acquiring and maintaining knowledge of MAS's products and services to enable effective sales and cross sales.
- Undertaking other tasks from time to time, as determined by the Regional Manager.

## Competencies

The following are the competencies the Adviser is expected to display and against which their performance will be measured:

- Builds quality relationships
  - Works to develop and maintain quality relationships with internal and external contacts.
  - Proven teamwork and relationship building skills.
  - Ability to engage with people.
  - A true passion for meeting new people.
  - Excellent interpersonal communication skills.
  - An innate excitement to develop strategies to gain new membership.
- Provides exceptional service
  - Is strongly committed to providing the highest quality service, both internally and externally.
  - Strong service ethic.
  - Takes ownership for problem resolution.
  - Technically and judgementally sound.
  - An absolute commitment to great member outcomes.
  - Keenness to attend networking functions, MAS Member events and present to groups.
- Demonstrates an appropriate level of technical knowledge and sound decision making.
  - A high level of knowledge of MAS's products or proven experience in advising about and selling finance, insurance and investment products.
  - Demonstrated understanding of the application of sales techniques and proven ability in applying these.
  - Excellent time management and organisational skills.
  - Tertiary qualification in a finance or business related discipline (or commitment to study towards).
  - An ability to produce high quality written documentation.
  - Demonstrated computer skills and literacy.
- Focused on improvement and innovation
  - Strives to identify and implement ways to improve MAS and themselves.
  - A positive attitude.
  - An ability to focus on key issues.
- Self management
  - Maintains the types of attitudes and behaviours that will impact positively on MAS's future success.

- An ability to self motivate and work without supervision.
- An ability to work effectively under pressure.

In addition, this role will have specific performance objectives, which will be set and assessed on a regular basis.

### Working relationships

Responsible to: Regional Manager - local region or Sales Manager

Responsible for: Nil.

Internal:

The Adviser will liaise with and provide advice and assistance to:

- General Manager, Sales.
- Regional Managers.
- Senior Advisers.
- Advisers.
- Member Support Sales.
- Branch Administration.
- Head Office teams.

External:

The Adviser will liaise with:

- Members.
- Business associates.
- Other financial services companies.
- Solicitors, accountants and other professional advisers.

Delegations are as outlined in MAS Delegation policies, which are available on MAS's intranet and subject to change at any time.

Positions in MAS may change over time as the organisation develops. We are committed to maintaining a flexible organisation structure that enables us to meet changing market and Member needs. Responsibilities for this position may therefore change over time as the job evolves.





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