

Coordinator, Shareholder Services Sun Life Financial

Role Summary:

The purpose of this job is to organize the release of Sun Life Financial's ("SLF") unclaimed and restricted demutualization benefits to the appropriate holder, to deliver quality service in response to routine shareholder inquiries according to established service standards and to assist in the coordination of quarterly report mailings to shareholders. The Coordinator, Shareholder Services ("SS") is responsible for the proper validation of each account, updating client records and providing specific instructions to the Transfer Agent for the distribution of demutualization benefits. The position requires effective and accurate communication with internal and external stakeholders, including shareholders, the Transfer Agent, Call Centres and Business Groups. The Co-ordinator, Shareholder Services is also responsible for providing administrative support to the Manager, Shareholder Services and to the department as required.

Main Accountabilities:

- Respond to routine shareholder inquiries within a two business-day turnaround and in the case of inquiries requiring further investigation, a five business-day turnaround
- Validate client records appropriately in collaboration with various SLF Business Groups to ensure unclaimed or restricted demutualization benefits are released to the correct holder
- Coordinate the release of outstanding unclaimed or restricted demutualization benefits with the Transfer Agent. Prepare Treasury Directions to issue share certificates to the appropriate holder(s) at their most current address
- Obtain appropriate documents that remove policy/title restrictions before releasing demutualization benefits to holders with restrictions such as bankruptcy, liens, court garnishments and collateral assignments
- Process demutualization cash and dividend cheque payments in foreign currencies using an online banking system. Responsible for providing the correct enclosures when mailing cheques to holders
- Assist in the execution of asset reunification programs relating to missing policyholders entitled to demutualization benefits and shareholders entitled to unclaimed dividends
- Coordinate mailings to lost policyholder/shareholders as required
- Review chequing account statements and periodically follow up and re-issue uncashed or stale-dated cheques
- Report monthly tax remittance amounts to government tax agencies in Canada and the U.S.
- Assist the Manager, Shareholder Services with the preparation of annual tax receipts for dividend disbursements made to found policyholders/shareholders
- Prepare statistical reports to track shareholder communications and progress on other projects as required
- Update, in conjunction with the Manager, Shareholder Services, existing call centre scripts and Q&A documents for SLF and the Transfer Agent
- Assist with the coordination of interim financial report mailings to shareholders including the timely receipt of mailing material to the Transfer Agent or mail house
- Co-ordinate, in conjunction with the Manager, Shareholder Services, certain Annual Meeting mailing activities

- Generate Purchase Orders and process invoices for the payment of Shareholder Services, annual meeting and other miscellaneous invoices

Skills and Competencies:

- Advanced verbal and written communications skills
- Strong customer service and problem solving skills
- Highly attentive to accuracy and detail
- Highly organized and efficient
- A strong team player
- Ability to work well with short deadlines

Knowledge and Experience:

- Three to five years of experience in customer/shareholder services within a publicly traded company, trust company, or financial services organization. Experience in a Corporate Secretary's department preferred
- Proficient in computer skills, including Word, Excel and Lotus Notes
- Proficient in the use of databases and online banking systems
- Post-secondary education required

Notes/Unique Requirements:

- Biligualism is an asset
- Periodic overtime as required