EMPLOYMENT OPPORTUNITY
VISION CREDIT UNION LTD.

INVESTMENT AND LIFE INSURANCE SPECIALIST

The Position:

This position may be required to travel to Rural Alberta/East Central Communities.

The Investment and Life Insurance Specialist will apply an advanced approach to financial planning, matching clients' financial needs with the best solutions, tailored to their situation. This role will be attractive to individuals who are confident, highly organized and driven to succeed. The skills to provide excellent service are essential. The objective will be to provide financial advice and assistance to clients, while strengthening the overall presence of VCU Financial in the communities it serves. The Investment and Life Insurance Specialist will work with an existing book of business as well as work with other VCU Financial staff members to identify and distribute referral opportunities.

This is a full time permanent position.

For complete job posting details, please visit our website www.visioncu.ca/personal/aboutus/careers

The Person:

- 5 years of experience in providing financial advice to clients in the areas of financial planning, investment, and risk assessment.
- Must have their CFP, PFP, or QAFP qualification, or be nearly completed.
- Life Insurance License required, or willing to obtain promptly.
- Must be eligible for MFDA Licensing.
- Professional-level knowledge of Canadian investment products, strategies, and concepts.
- Demonstrate a high level of ownership, accountability, and initiative.
- Fully proficient with industry standard systems and programs such as securities processing and portfolio management software.

Compensation:

- Salary commensurate with experience.
- Comprehensive benefits package.

SUBMIT RESUME AND COVER LETTER TO:
Jennifer Hormann,
Vice President of Human Resources
Vision Credit Union Ltd.
Corporate Office
5007 – 51 Street
Camrose, Alberta T4V 1S6
Fax 780-679-0569
jobs@visioncu.ca

Only those individuals invited for an interview will be contacted.

Position Title: **Investment and Life Insurance Specialist**
Reports To: Senior Vice President of Operations & Premises

Summary

The Investment and Life Insurance Specialist will apply an advanced approach to financial planning, matching clients' financial needs with the best solutions, tailored to their situation. This role will be attractive to individuals who are confident, highly organized and driven to succeed. The skills to provide excellent service are essential. The objective will be to provide financial advice and assistance to clients, while strengthening the overall presence of VCU Financial in the communities it serves. The Investment and Life Insurance Specialist will work with an existing book of business as well as work with other VCU Financial staff members to identify and distribute referral opportunities.

Core Competencies

- Member Focus
- Networking and Relationship Building
- Communication
- Accountability and Dependability
- Result Focused
- Ethics and Integrity
- Decision Making and Judgement
- Energy & Stress
- Teamwork
- Quality Orientation
- Time Management
- Adaptability/Flexibility
- Creative and Innovative Thinking
- Planning and Organizing
- Analytical Thinking
- Mediating and Negotiating
- Research and Analysis
- Leadership

Job Duties/Responsibilities

- Build and maintain a book of business by sourcing new business, building relationships with other VCU Financial business lines, developing existing clients and community relationships.
- Receive client inquiries on behalf of associates/advisors and determine the appropriate course of action.
- Process mutual fund transactions for clients as required.
- Maintain filing of individual client files according to specified procedures and guidelines.
- Review, analyze and update client files to meet practice engagement manual (PEM) standards.
- Enter confidential client-specific information on financial planning software.
- Assist with the implementation and maintenance of member/client fulfillment programs.
- Assist in planning and coordination of seminars for both the public and for select clients.
- Assist with coordination of client appreciation activities in conjunction with advisors/specialists.
- Filing and clerical duties as required, ensuring documents are accessible and orderly.
- Adhere to legislation and security procedures accurately and promptly.
- Actively solicit new business opportunities within the community and/or trading area through personal contact, cold calling, report analysis, and follow-up on referrals.
- Prepare and present investment strategies appropriate for the achievement of each client's specific goals and objectives.

- Advise on VCU Financial off-book (mutual fund) investment and life insurance products.
- Perform ongoing client service, financial goal review, and portfolio rebalancing as appropriate to proactively identify existing and emerging needs.
- Serve as an internal resource for VCU Financial peers in the provision of financial products and services, concepts, and advice.
- Monitor own results against performance objectives and take appropriate action to ensure goal attainment.
- Work with Vision Credit Union marketing team to identify and provide input into social media content on behalf of VCU Financial.
- Work primarily out of a base location to conduct meetings with clients virtually. Occasional travel with be required to meet clients in person.
- May relieve other positions as required and deemed appropriate.
- Keep current with ever-changing work environment.
- Complete annual training for the position as outlined in the Vision Credit Union Ltd. training progression document, ensuring knowledge is evident and procedures are followed.
- Obtain annual continuing education credit requirements specific to the industry and designation attained.
- Adhere to all Vision Credit Union Ltd. policies and procedures.
- Follow all compliance policies and procedures in relation to Anti-Money Laundering and Anti-Terrorist Financing Guidelines.
- Assist the Senior Vice President of Operations & Premises with other duties as assigned.

Requirements

- 5 years of experience in providing financial advice to clients in the areas of financial planning, investment, and risk assessment.
- Must have their CFP, PFP, or QAFP qualification, or be nearly completed.
- Life Insurance License required, or willing to obtain promptly.
- Must be eligible for MFDA Licensing.
- Professional-level knowledge of Canadian investment products, strategies, and concepts.
- Understanding of regulatory and compliance policies and procedures.
- Proven track record of achieving and exceeding sales objectives.
- Possess strong organizational, time management, communication, and interpersonal skills.
- Demonstrate a high level of ownership, accountability, and initiative.
- Fully proficient with industry standard systems and programs such as securities processing and portfolio management software.
- Computer literate, including effective working skills of MS Word, Excel, and Outlook.
- Able to work efficiently as part of a team as well as independently.
- Effective business communication skills including written, verbal, and interpersonal, analytical problem solving and decision-making skills.

Vision Credit Union Ltd. – we "see" banking differently.

We may very well be the right fit for *you*….and *you* for us.

We're Vision Credit Union. Although we offer loans, deposits, financial planning service, RRSP's, mutual funds, insurance products and other product that most F.I.'s are able to offer, we do things a little (some would say a lot) different at our "shop".

Our focus is our 37,000 member-owners. We're an organization based on principles over profit. If you are eager to launch a rewarding career with our organization, you will need to be able to naturally and consistently provide "well above the norm" member service. After all, the Credit Union system has been chosen tops in Canada for twelve years straight in the area of customer service. That's a reputation we pledge to continue.

We believe that charging excessive fees or providing products and services that benefit our Credit Union more than our valued members is wrong. We also believe that the bulk of our profits must be shared by our members and that some of our profits need to be channeled back to community initiatives in the small rural communities where we live and work.

At Vision Credit Union, an equal opportunity employer, we treat members special. Our goal is to ensure that every one of our members feels like an extension of our "family". The team, of which you would be a part, is small in numbers but capable of "moving mountains". We believe in common purpose (life-long member-owners). We strive for error-free work and accountability. We're collectively recognized for our great work: in both 2016 and 2017 Vision C.U. was named one of ***Alberta's Top 70 Employers***. In 2016, 2018 and 2019, Vision earned the title: ***Alberta's Credit Union of the Year*****.**

We are always "on the hunt" for enthusiastic, astute and motivated team members. Joining us represents an opportunity to go home from work feeling fulfilled. At Vision, you will enjoy a salary that is at or above industry standards and there are exceptional advancement opportunities for the right individual. If you feel you can offer skill and passion to help our organization continue being the financial service provider of choice in rural and entrepreneurial Alberta, we invite your resume.