

Are you nimble? Are you a talented, passionate professional who prides themselves on providing sound financial advice to individuals, families, and businesses? If you are results oriented and a natural relationship builder then we want to meet you!

Westoba Credit Union and Westoba Financial Solutions is looking for a Financial Planner just like you!

#### **A day in the life as a Financial Planner:**

- You believe in being a trusted advisor to your members and guiding them through their financial plan
- Implement business development strategies to acquire new business and cultivate branch employee referrals
- Identifies opportunities during member conversations to generate referrals for retail and business banking products
- You will develop and implement a relationship management plan to meet the needs of the member while building long-term, quality relationships both internally and externally
- You will also gain the member's commitment and ensure that every member leaves every interaction satisfied
- Introduce members to investment strategies and works with members to develop a financial plan using guidance tools
- Think imaginatively and proposes new solutions while working mostly self-sufficiently

#### **What you bring to the table:**

- 3+ years of relevant experience and post-secondary degree in related field of study or an equivalent combination of education and experience
- Currently MFDA licensed and has the continued ability to remain MFDA licensed
  - Canadian Securities Course or IFSE- Licensed to offer mutual funds
- Certified Financial Planner (CFP) designation preferred or one of the following:
  - Qualified Associate Financial Planner (QAFP™) or Personal Financial Planner (PFP) designation
- Licensed with the Insurance Council of Manitoba (ICM)
- Working knowledge of financial industry is an asset
  - Has the ability to analyze complex financial situations whether it be personal, business, or agricultural

#### **What Westoba has to offer:**

- Competitive compensation and benefits
- Results-orientated bonus program
- Dollars invested in your education
- Discounted rates on your annual GoodLife Fitness membership
- Plus awesome financial perks including:
  - No-fee chequing and savings accounts
  - Preferred rates on deposits
  - Discounted rates on loans

Please note, some travel may be required.

**If this is you, please submit your cover letter and resume by applying at <https://westoba.com/about-us/careers/> If this role is not right for you, referrals are always welcome!**

**We thank all applicants; however, only those who are short-listed will be contacted.**

**WCU**