



Position: Financial Planner (Permanent Full-time)

Location: Peterborough, ON

Hours: Monday to Saturday, 40 hours per week

Rate of Pay: Dependent on experience

As a Financial Planner, you will:

- Become members' trusted advisor by providing expert advice and solutions in the area of financial planning – including investments, financial management, tax planning and retirement planning.
- Develop and deliver modular financial plans to assist members in achieving their financial goals.
- Meet and exceed targets through the deployment of business and tactical planning.
- Establish and maintain effective relationships with members.

Qualifications Required:

- A financial planner designation – Certified/Chartered Financial Planner (CFP), Chartered Life Underwriter (CLU), Master Financial Planner (MFP), Chartered Management Account (CMA), Chartered Financial Analyst (CFA), or Canadian Institute of Financial Planning (CIFP).
- Post-secondary education in business, finance, economics is preferred.
- Minimum 5 years delivering, monitoring and reviewing financial plans.
- Active and in good standing IIROC License.
- Deep understanding of the wealth industry, competitive landscape and economic issues.
- Solid business acumen, with extensive knowledge of the financial industry including competitor offerings, market trends, and the regulatory environment.
- Advanced member service and sales skills.
- Demonstrated passion for financial planning and helping others.
- Strong written and verbal communications skills.
- Knowledge of financial planning software.
- A valid driver's license as travel in region may be required.

How to Apply:

If you are interested in pursuing a career in the financial services industry with a dedicated, enthusiastic team of professionals in a growing organization that supports an inclusive barrier-free recruitment and selection process, please forward your resume outlining experience, qualifications, and salary expectations referencing “**21-PW-37**” to;

E-Mail: humanresources@kawarthacu.com

We thank all applicants for their interest in Kawartha Credit Union but will only be contacting applicants that have been selected to move forward in the recruitment process. If you are selected, we will contact you directly.

If contacted regarding a job opportunity, please advise if you require accommodation.