

# Financial Planner

**At Kindred Credit Union, you will be part of cooperative banking that connects values and faith with finances, inspiring peaceful, just, and prosperous communities.**

You're invited to make a difference... as a full time Financial Planner in Aylmer.

In this role you will come alongside our members, building relationship to understand their life goals and values, financial circumstances and tolerance for risk. You'll be able to recommend tailored solutions from Kindred's comprehensive suite of registered and non-registered products, including Socially Responsible Funds and GICs. Whether starting a member on a savings plan for a first home purchase, for retirement, or to plan withdrawal of assets during retirement, you'll be there at each stage of life to help members realize their goals.

## Key Responsibilities

- Proactively manage a portfolio of members, building long term relationships
- Provide financial planning for members needing comprehensive advice
- Advise members about savings strategies, long term benefits of mutual funds to generate greater returns compared to GICs and deposits, and socially responsible investment options
- Collaborate with other specialists for members needing insurance or credit solutions

## What to bring

You bring a passion about getting to know people, and finding choices and solutions that best fit their needs. You are excited about how Kindred's investment portfolio options allow members to experience banking with purpose, and finally, you are committed to building members' financial knowledge and confidence in their financial decisions.

## Plus, you bring your qualifications and experience:

- > Completion of a post-secondary program in Business or a related field
- > 5+ years of investment and financial planning experience
- > MFDA license and experience selling funds
- > CFP / PFP designation
- > Business development experience

## Why Kindred

You will be part of a collaborative workplace where you'll be asked to participate in the business and share your voice. You'll be expected to continually grow your skills and abilities and to share your expertise and experience with colleagues.



We believe that your life is bigger than any job, so we'll work together to achieve work-life quality and to care for your overall wellness. And of course, your rewards package includes competitive total compensation plus an array of financial products and services at preferred rates for staff. When you choose Kindred to further your career, you're joining an engaged workforce at a certified [B Corp™](#) that is committed to using business as a force for good™ and acting as an advocate for a [Living Wage](#).

**Our comprehensive total rewards package includes:**

- Competitive total compensation
- Starting salary range \$70,000 - \$88,000. This role has multiple levels; placement will be commensurate with experience.
- Group benefits plan & commitment to staff wellness
- Starting at 4 weeks vacation, vacation purchase program
- Career growth opportunities, continuous training & development support
- Staff benefits on financial products & services (including Group RSP matching)

**RSVP**

Ready to choose Kindred? Visit us at [www.kindredcu.com/careers](http://www.kindredcu.com/careers) to learn more about why people enjoy working with us and what we offer. Please apply with your resume. We look forward to connecting with you!