

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

in our Leamington Branch

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

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:

- > Post-secondary education, and
- > 2-4 years of progressive experience in financial services
- > Mutual Fund license and experience selling funds
- > Financial planning experience, with CFP / PFP designation (or in progress)
- > Effective at relationship building and communication

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. You'll also be supported in volunteering your talents for community and other programs that are important to you.

We believe that your life is bigger than any job, so we'll work together to achieve work-life quality and to care for the overall wellness of the whole you. And of course, your rewards package includes competitive total compensation plus an array of financial products and services at preferred rates for staff. By choosing Kindred, you'll be joining an engaged workforce: we're a provider of a Living Wage, and we're using business as a force for good™ as a B Corp.

RSVP Ready to choose Kindred? Visit us at www.kindredcu.com to see how integrity, compassion and stewardship are woven into everything we do. Apply here with your resume and cover letter explaining why you want to work for Kindred. We look forward to connecting with you!