

## **You're invited to make a difference... as a Wealth Regional Manager**

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

Reporting to the Director, Wealth and Investments, in this new role you will directly supervise, coach and mentor a regional team of Financial Planners to ensure that Kindred members experience financial planning advice and solutions that are customized to their need and incorporate their faith and values. Partnering with branch leaders, you will also help grow capabilities of the retail team in wealth and investment products and solutions. Travel within your regional area is expected to support team members on-site while providing flexibility within your schedule.

### **Key Responsibilities**

- Share information, insight and analytics to help team members effectively manage their portfolio and serve a growing membership
- Implement a quality assurance program to review financial plans
- Support business development and community engagement efforts
- Collaborate to implement corporate initiatives impacting wealth services across the region providing effective communication and change management

### **What to bring**

As an experienced planner, you bring solid expertise in providing tailored advice, managing a book of business, and building partnerships in the community and relationships with members. You have demonstrated strengths in developing others, coaching and mentoring. Finally, you are a strong collaborator, with experience partnering cross functionally.

### **Plus, you bring your qualifications and experience:**

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| > Post-secondary education in business or a related field   | > Leadership experience, and demonstrated skills in coaching and developing others |
| > 5 or more years of financial planning experience, proven excellence in member service and practice management | > CFP or PFP designation   |
|   | > Active commitment to Kindred's shared values and purpose                         |

### **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 your overall wellness. 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 inclusive and 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.

### **RSVP**

Ready to choose Kindred? Visit [kindredcu.com](https://kindredcu.com) to see how compassion, integrity 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!