

# Wealth Advisor

## True North Square Financial Advice Centre

Jointly reporting to the Branch Manager and the Director of Wealth, the Wealth Advisor provides expert financial advice, direct sales, and ongoing service to members on a full range of investment products with the primary focus on Mutual Funds. The position proactively manages a portfolio of members to increase business retention and share of wallet, and provides advice on all aspects of financial planning. The Wealth Advisor holds a Certified Financial Planner (CFP) designation and provides a full range of proactive financial planning services. Responsible for contributing to the sales culture of the branch, the Wealth Advisor provides ongoing training, coaching and mentoring of team members relating to their area of expertise.

### KEY ACCOUNTABILITIES

Proactively develop and manage a portfolio of member relationships (members must hold Mutual Funds); assess and anticipate individual member needs to maximize member relationships; develop a portfolio and contact management plan.

- Conduct regular portfolio reviews with members.
- Engage with members to clarify financial goals and objectives in the short and long term. Complete financial analysis to develop investment strategies for members and provide financial advice on wealth management, insurance, tax planning, investment and retirement planning, and estate planning.
- Engage in proactive sales and business development activities including follow-up, annual business planning, and professional contact with prospects.
- Maintain close working partnerships with other areas of the credit union; liaise with branches, insurance services, and investment product suppliers.
- Facilitate referrals and the follow up for financial services not directly sold or delivered by this role Provide training, coaching, technical expertise and advice around Wealth products, financial planning practices and concepts to team members.
- Accountable for reaching sales, revenue and referral targets annually including goals associated with the overall Wealth results of the branch.
- Ensure that all legislative, policy and compliance guidelines in the sale of all credit union and third party products and services are adhered to, including KYC (Know Your Client) and KYP (Know Your Product).
- Employees are required to keep strictly confidential the affairs of anyone whose private information becomes available to them in the course of their duties.

*The same inspired and passionate people who choose to bank here are the people who choose to work here.*

The culture of ACU is supportive of the individual while focused on the greater community. You'll be motivated by shared values and encouraged to always think about how, through financial sustainability, we can do more for our members, our employees and our community. You'll not only be accountable for what you do, you'll be rewarded for your accomplishments.

Whether your role in our business is working directly with members, improving our processes or promoting ACU, your work will create impact. It will contribute to building an organization focused on service, teamwork, diversity, integrity and social and environmental responsibility.

Using finance for good is at the heart of how we do business and is demonstrated through our focus on the triple bottom line of people, planet and prosperity. If doing things differently and doing more is part of who you are, join us on a rewarding journey where your personal aspirations and career goals can align.

[ACUcareers.ca](https://www.acucareers.ca)

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### QUALIFICATIONS

Post-secondary education in a business related field, accompanied by four to six years of job related experience or equivalent combination of both education and experience.

- CFP designation is required or the ability to obtain within 18 months.
- Mutual Funds license is required
- Excellence at building and maintaining relationships
- Strong customer service skill with ability to provide advice and service
- Demonstrated investments and financial planning skills with ability to negotiate and work with members as needed
- Ability to work in a team and independently with excellent problem solving skills
- Strong organizational and time management skills
- Knowledge of the Credit Union products and services would be an asset
- Self-motivated with the ability to create and execute on plans to reach goals

### Who we are:

As one of Manitoba's Top Employers (2021), the culture of Assiniboine Credit Union is supportive of the individual while focused on the greater community. You'll be motivated by shared values and encouraged to always think about how, through financial sustainability, we can do more for our members, our employees and our community. Choosing to work at Assiniboine Credit Union means that you'll be working for an organization that...

- puts people, planet and prosperity first,
- values diversity and inclusion,
- is focused on social and environmental responsibility,
- supports employees through training programs and long-term career development,
- offers a competitive total compensation program which includes bonuses, a matched pension program, and health and dental benefits

If doing things differently and doing more is part of who you are, join us on a rewarding journey where your personal aspirations and career goals can align.

**[Submit your applications by May 2, 2021.](#)** We thank everyone who applies but only candidates selected for an interview will be contacted. We are committed to workforce diversity and actively recruit people with diverse backgrounds, experiences, and perspectives reflecting the community in which we live and work.

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