



Financial Advisor

Position:	Financial Advisor
Department:	Sales & Member Experience
Reports to:	Director, Sales & Member Experience
Posted Date	March 20 th , - March 27 th , 2024

Position Summary

This role involves understanding Members' financial needs, offering tailored advice, and meeting set goals. The Advisor will cultivate Member relationships, promote mutual fund products, and engage in revenue-generating activities. They will also support other roles within Pathwise Credit Union as required.

Position Responsibilities

- Conducts Member interviews to assess needs, risk tolerance and goals.
- Offers credit product recommendations and manages loan applications.
- Creates and manages personalized investment portfolios.
- Opens new Member accounts and grows investment portfolios.
- Proactively makes outbound calls to boost business.
- Identifies and refers Members to Commercial or Wealth Management partners.
- Manages deceased Member estates and asset disbursement.
- Resolves Member issues and escalates complex problems.
- Maintains Member files and reports to management.
- Possesses advanced knowledge of mutual funds, regulatory requirements, and Credit Union policies.
- Stays updated on national and local regulations and financial market trends.
- Keeps abreast of competitive products and market trends.
- Attends relevant industry events.
- Supports revenue generation and meets performance targets.
- Ensures compliance with regulations and procedures.
- Performs assigned duties diligently.

Educations & Experience

- As a minimum, a Secondary School Graduation Diploma (or equivalent).
- Three years of credit union work experience.
- Pathwise approved lending courses.
- Must hold a Mutual Funds license.



Knowledge, Skills & Capabilities

- Demonstrates creativity and innovation in problem-solving.
- Self-motivated with strong attention to detail and a sales-driven mindset.
- Excellent planning and prioritization skills, adept at managing deadlines and unforeseen challenges.
- Proficient in analyzing complex information from diverse sources.
- Flexible and able to adapt to shifting priorities, including process redesign and retraining.
- Possesses advanced knowledge of all Credit Union products and services, as well as policies and procedures.
- Effective verbal and written communication skills, with the ability to handle challenging situations diplomatically.
- Proficient in Microsoft Word, Excel, banking systems, and related programs.
- Holds a valid driver's license and is mobile, able to work at various Pathwise locations with additional travel as needed.
- May be required to work extended hours as per Collective Agreement provisions.

Applications

Candidates should submit their application, cover letter, and resume to:

Attention: HR Manager

Subject: Financial Advisor Application

Email: HRPATHWISE@PATHWISE.CA