

Assistant Branch Manager

Job Title:	Assistant Branch Manager (ABM)
Reports to:	Branch Manager
Division:	Bowmanville

Reporting to the Branch Manager the Assistant Branch Manager (ABM) is responsible to manage, guide, direct, and coach employees to deliver exceptional service to Pathwise members and prospects. The ABM needs to ensure a member-centric approach is provided consistently to the membership and new potential members. They will ensure the team is trained and informed on products and promotions to offer to members to assist them in meeting their financial objectives. They will be focused on creating a culture that aligns to PCU's Core values. Reporting to the Branch Manager the ABM is expected to:

- Encourage and maintain efficiency and performance by improving, developing, and coaching their team through sharing information, feedback, training opportunities and ensuring performance management activities are completed.
- Manage and oversight of MSR's, front line and Call Center staff ensuring targets are met.
- Effectively communicates expectations and monitors performance against those expectations.
- Support on-going development of your team through consistent routines to ensure a high level of employee capability and engagement.
- Ability to meet or succeed targets.
- Build an informative, positive, and diverse work environment by promoting open and transparent dialogue and encouraging good working relationships.
- Partner with the Branch Manager to ensure operational effectiveness of the branch and maximize the performance of the team.
- Back up and cover front line during peak times, lunches and staff shortages
- Support, promote and execute Pathwise business plan objectives.
- Promote continuous improvement strategies by analyzing data and information to provide insights and recommendations.
- Leading overall success of the branch by maintaining and optimizing branch profitability.
- Identify emerging issues and trends.
- Protect Pathwise, the members, and shareholders interest by managing and minimizing exposure to risk by ensuring compliance with regulatory activities and guidelines.
- Ensure the achievement of branch objectives through the negotiation, establishment, and monitoring of goals.
- Provides technical training and support to branch employees to maintain operational and sales effectiveness and recommends improvements.
- Resolves complex or unresolved member situations.
- Identifies and reports suspicious patterns of activity that are suspected to be related to money laundering.
- Develops and maintains a network in the community to enhance the Pathwise visibility and builds a strong referral source for new potential business.
- Oversees and approves schedules and vacations
- Supports the Pathwise by community involvement and participates in community activities.
- Identifies and reports suspicious patterns of activity that are suspected to be related to money laundering.
- Complies with all legal and regulatory requirements for the jurisdiction.
- In an emergency act as a resource to support the member experience as needed.
- Act as a backup to the Branch Manager in Oshawa and Bowmanville.

Oshawa Branch
 322 King Street West
 Oshawa, ON L1H 7L1
 F | 905.728.8727

Bowmanville Branch
 221 King Street East
 Bowmanville, ON L1C 1P7
 F | 905.623.4821

T | 905.728.5187
 TF | 1.800.268.8771

- Point of contact for emergency issues outside of normal business hours.
- Broader work or accountabilities may be assigned as needed.

Qualifications:

- Effective communication and decision-making skills, with the ability to communicate and lead change.
- Completion of an acceptable mutual fund branch management exam and BCO certified or ability to write the exam within 6 months of start date.
- 3 - 5 years of relevant experience and post-secondary degree in related field of study or an equivalent combination of education and experience.
- 1-3 years of banking or member service/sales or equivalent experience.
- Previous supervisory or management experience - preferred.
- General knowledge of applicable regulations, audit standards, and related policies, procedures, and directives.
- Working knowledge of competitive marketplace and trends in product offerings.
- Working knowledge of branch technologies, processes, and performance metrics.
- Specialized knowledge from education and/or business experience.
- Analytical and problem-solving skills - In-depth.

At PCU we are driven by our Vision..... It calls on us to create lasting, positive change for our members, our communities, and our people.

As a member of the PCU team you are valued, respected, and heard, and you have more ways to grow and make an impact. We strive to help you make an impact from day one – for yourself and our members.

PCU is committed to an inclusive, equitable and accessible workplace. By learning from each other’s differences, we gain strength through our people and our perspectives.

Send your resume and cover letter to careers@pathwise.ca

Posted June 6th, 2024

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