

## **Company Overview**

1st Choice Savings is a full-service financial institution and cooperative serving approximately 19,000 members across a network of 5 branch locations in Southern Alberta. With assets under administration exceeding \$1 billion, 1st Choice Savings is a financially strong Credit Union with the potential for growth. We put our members' financial well-being first, above all else. For further information, please check out our website at [www.1stchoicesavings.ca](http://www.1stchoicesavings.ca).

## **Position – Financial Service Representative**

The Financial Service Representative provides basic financial advice to assist members with their financial decisions. This includes actively promoting and cross-selling financial products and services to increase the overall profitability of the credit union.

## **What You'll Do:**

*Engage and deliver the 1<sup>st</sup> Choice Savings brand promise by delivering a consistent brand experience to members:*

- Follow the 1<sup>st</sup> Choice Onboarding activities with every member interaction.
- Refer members to specialized experts within the credit union network such as Financial Advisors, Financial Planners and Account Managers when complex financial needs arise.
- Use the supporting tools available to help identify the member's current financial situation, their future financial goals, and provide guidance on how the members can accomplish their future financial goals.
- Maintain accurate and up-to-date records of member interactions, transactions, and account information through the appropriate systems such as a CRM, banking floor system, and financial discovery tools.

*Focus on Business Development initiatives that will align with the corporate strategy and brand promise:*

- Review and update existing credit and loan files in a timely fashion and utilize this as an opportunity to provide value-added information, advice, and recommendations.
- Generate and develop new memberships to increase revenue by outbound calling, attending networking functions, and creating a referral base through centers of influence or through the existing membership base.
- Promote and maintain awareness of 1<sup>st</sup> Choice Savings in your community and network.
- Participate in any development activities to ensure the success of the branch and the organization.
- Maintain appropriate record keeping to ensure year end goals are met (i.e. pipelines, goal tracking, calendar bookings, etc.)
- Develop and maintain strong relationships with centers of influence, management, members, and the community.

- Manage risks within the standards of sound business practice and comply with legal and regulatory requirements.

### **Who You Are:**

Our ideal candidate will have the following:

- Post secondary education in Business or Finance. An equivalent combination of education and experience will be considered.
- Minimum 1-3 years of experience in the financial services industry. Previous experience in lending and investments is an asset.
- Takes a member-centric approach, shows genuine empathy and understanding towards member concerns and needs.
- Strong interpersonal skills with a demonstrated ability to deal with people in a tactful, diplomatic and professional manner.
- Commitment to ongoing training and development to stay informed about organizational and industry changes, regulations, and ethical standards.

***We thank all candidates for their interest, however only those candidates selected to be interviewed will be contacted.***

For further information on this opportunity or to submit a resume and cover letter, please contact:

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