

## Company Overview

1<sup>st</sup> 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, 1<sup>st</sup> 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 Advisor

The Financial Advisor helps members manage their short- and long-term investment and lending needs by providing advice, and guidance as it aligns with their financial planning strategy.

### 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.
- Proactively assist members with structuring their investment and retirement needs by utilizing different investment strategies in conjunction with the available product options, as well as optimizing the different Wealth Strategy options based on the member's need and financial plan.
- Use the supporting tools available to help review the member's current financial situation, identify their future financial goals, and provide guidance on how the members can accomplish their future financial goals.
- Create and manage a scheduled contact plan to provide financial literacy sessions with assigned portfolio members.

*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 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.)
- Offer and assist on a broad range of investment options such as mutual funds, locked-in funds, RESPs, RIFs.
- 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 3-5 years of experience in the financial services industry with a solid understanding of retail lending (including mortgages) and investment products.
- Completion of the Financial Planning 1 course is required.
- Mutual Funds license and experience is required.
- Strong interpersonal skills with a demonstrated ability to deal with people in a tactful, diplomatic and professional manner.
- Proven business development and growth skills.

***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:

Lily Harms  
Associate People Development  
(403) 320-4600  
[recruiting@1stchoicesavings.ca](mailto:recruiting@1stchoicesavings.ca)

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