

## **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 a promising potential for growth. The organization follows a corporate purpose and guiding principles where the goal is putting the members financial well-being first, above all else. For further information, please check out our website at [www.1stchoicesavings.ca](http://www.1stchoicesavings.ca)

## **The Position – Financial Advisor**

The Financial Advisor is responsible for recognizing needs of member and thinking creatively to identify opportunities and solutions that are mutually beneficial to 1<sup>st</sup> Choice Savings and the member's Financial Plan.

## **Key Accountabilities:**

*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 to ensure a consistent member experience delivery with every interaction.
- Proactively manage and maintain regular communication with an assigned portfolio of members to strengthen and grow the financial relationship by helping members manage their short to long term goals for both investment and lending needs by providing general counsel, advice, and guidance as it aligns with their financial planning strategy.
- 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 members need and financial plan.
- Use the supporting tools available to help identify the member's current financial situation, their future financial goals, and to support 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 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, maintaining 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 center of influences, management, members, and the community.
- Manage risks within the standards of sound business practice and comply with the legal and regulatory requirements.

### **Skills and Qualifications:**

- Post secondary education in commerce or finance, or an equivalent combination of education and experience.
- Financial Planning 1 required; continuing education may be required.
- Mutual Funds license and experience required.
- 3-5 years of experience in the financial services industry with a solid understanding of retail lending (including mortgages) and investment products.
- Highly flexible with strong interpersonal skills to work effectively in a diverse environment. Ability to deal with people sensitively, tactfully, diplomatically and professionally at all times.
- Proven business development and growth skills.

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

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