

## 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 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 Service Representative

The Financial Service Representative is responsible for recognizing needs of the 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 goals.

## 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 members to strengthen and grow their financial relationship by helping members manage their short to long term goals for deposit accounts, investments, and lending needs by providing general counsel, advice, and guidance as it aligns with their financial goals.
- Provide basic financial counselling to help members manager their budgets, plan for major expenses, and make informed financial decisions.
- Actively promote and cross-sell various suitable financial products and services aiming to increase the overall profitability of the credit union.
- Referring members to specialized experts within the credit union network such as Financial Advisors, Financial Planners, Account Managers, when more complex financial needs arise.
- 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.
- Maintaining 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 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 ensuring year end goals are met, i.e. Pipelines, goal tracking, maintaining calendar bookings, etc.
- 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.
- Highly organized individual with a strong desire for quality work standards.
- 1-3 years of experience in the financial services; previous experience in lending and investments would be a strong asset.
- Has a high standard of integrity when dealing with members by taking a member-centric approach, following through on commitments, respecting privacy and confidentiality, ethical decision-making, taking ownership, and conveying genuine empathy and understanding towards member concerns and needs.
- Highly flexible with strong interpersonal skills to work effectively in a diverse environment. Ability to deal with people sensitively, tactfully, diplomatically, and professionally always.
- Commitment to ongoing training and development to stay informed about organizational and industry changes, regulations, and ethical standards.

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

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