

Position: Investment Specialist

Competition: 10-ISFM-01

Closing Date: Open until filled

Location: Fort McMurray

Servus Credit Union is one of Canada's 50 Best Managed Companies and recognizes that our most valuable assets are our employees. We offer continued growth and career advancement and reward employees for their efforts and achievements. Servus Credit Union has also been recently recognized by Alberta Venture as one of the top 3 employers in Alberta for Human Resources Practices and Policies.

The Investment Specialist position is a sales/service role, and through a financial planning process will assist our members either directly or through referrals to the appropriate area, with their investment, insurance, and estate planning objectives.

Principal Duties

- **Financial Planning:** The Investment Specialist will build relationships with members and complete a needs analysis by gathering information relating to their goals and objectives; through financial analysis of their situation, a plan will be formulated and implemented and be subject to on-going review
- **Investment Products:** The Investment Specialist is required to identify opportunities for referrals to the Investment Advisory Department, and is encouraged to refer members with < \$25M in investments to a Licensed Personal Banker within their branch
- **Insurance:** It is understood that Insurance is a pillar of the financial planning process, and as a result the Investment Specialist will include this product in their needs analysis, and identify referral opportunities for the Insurance Services Department
- **Estate Planning and Trust Services:** A will is a critical component of our member's financial well-being; the Investment Specialist will review the need for this product, gather information and identify referral opportunities for our Trust and Estate Services Department

Qualifications

- The incumbent must possess superior communication, sales and service skills and have the ability to build trust and long term relationships with our members. In addition, the Investment Specialist is expected to remain current on market conditions and industry updates. Knowledge of investment related software applications is essential. Two years previous investment experience is required.
- A grade twelve (12) education supplemented with the IFIC or Canadian Securities course are requirements.
- Completion of the CFP program within a two year period is recommended.

To apply, please email your cover letter and resume to careers@servuscu.ca.

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We thank all applicants for their interest in Servus Credit Union.