NOW HIRING

VantageOne CREDIT UNION

Career Opportunity

TYPE: External Advertisement **DATE:** June 28, 2021
ROLE: Full Time Advisor
BUSINESS LINE: VantageOne Financial Corp.

VantageOne Financial Corporation, a wholly owned subsidiary of VantageOne Credit Union is growing, and we are looking for a Financial Advisor to join our team in Vernon BC. VantageOne has a network of branches located in the beautiful Okanagan Valley. Our Vernon location offers water sports, skiing and world class golf all within 20 minutes and a is a great community to raise a family. It does not get any better than this!

POSTING NUMBER: EX – 2021- 14

CLOSING DATE: Until Filled

HOW TO APPLY: Please **email** a resume and cover letter to HR@vantageone.net no later than **5:00 pm** on the closing date. Please indicate the advertisement number (EX -2021-14) in subject line of email.

About the role: Our team of talented professionals is client focused and committed to creating meaningful financial advice for all our clients. The successful candidate will have licensing on the MFDA platform, a license for life insurance sales and Certified Financial Planner status. We are prepared to work with someone who has partially completed these requirements, is experienced in one or more disciplines, or moving over an independent advisor with a book looking for more support and teamwork opportunities.

Who We Are: We are a credit union dedicated to the financial well-being of our members, clients, employees, and communities. Part of what sets VantageOne apart from others is that while we offer traditional banking and borrowing solutions, we have also strategically diversified our services to meet our members' expanding financial needs by offering Financial Ability with a Human Touch.

Our history as a credit union reaches all the way back to 1944 when we opened our first branch in Vernon. Since that time, we are proud to have become a vital part of the local business economy. From the very start, we have seen ourselves as a local business, owned by our members and operated by people who live here and are deeply invested in our communities.

Compensation includes a solid training program committed to your career development, full health, dental and disability benefits and a corporate RRSP contribution. We reward our Advisors' commitment and successes by offering compensation that is a mix of a guaranteed base salary with additional commission incentives.

We welcome applications from all interested; however, only those selected for an interview will be contacted.

POSITION TITLE:	**Financial Planner**
BUSINESS: UNIT/DEPARTMENT	**VantageOne Credit Union** **VantageOne Financial Corporation**
LOCATION:	**Vernon BC**
REPORTS TO:	**Vice President, Wealth Management**

PURPOSE OF POSITION

The Financial Planner supports VantageOne's vision by developing valuable long-term relationships with clients, pro-actively determining & fulfilling their investment and insurance needs and providing them sound advice with high-quality, tailored financial and insurance solutions to match their financial goals.

ROLES AND RESPONSIBILITIES

Financial Advisor:

- Conducts interviews with clients to clarify financial goals, and objectives in the short and long term. Completes financial analysis to develop investment strategies for clients and provides advice on wealth management, insurance, tax planning, investment and retirement planning, and estate planning; refers clients with complex financial planning needs.
- Develops and provides comprehensive financial plans and advice to ensure a positive rapport and ongoing client relationships are established.
- Proactively manages client relationships, pursuing internal opportunities/referrals, and external business growth opportunities.
- Identify cross-selling and referral opportunities to other VantageOne partners, achieve referral objectives; develop external leads, build referral relationships within the community.
- Achieves individual sales goals through a focus on seeking diverse investment and insurance solutions for all prospective and current clients.
- Expected to work under minimum supervision; the work is varied and complex; sound judgment is required in choosing from a wide variety of products within VantageOne Financial Corporation guidelines.
- Responsible for ensuring all annual licensing requirements and learning activities and other continuing education requirements are completed annually to maintain all licensing and designation(s).

Insurance Advisor:

- Proactively identifies clients' needs and provides comprehensive information regarding varying personal and business insurance packages such as Life, Disability, Critical Illness and private family health benefit insurance products.
- Actively manages and develops a portfolio of insurance accounts to ensure clients are covered for personal or business risks and other policy features best suited to meet the clients' needs; works with clients to manage and reduce risk.
- Underwrites a variety of personal and business insurance policies relating to the clients insurance needs.
- Responsible for ensuring all annual licensing requirements and learning activities and other continuing education requirements are completed to maintain all licensing and designation(s).

Business Development Role:

- Proactively develops and manages a portfolio of client relationships; assesses and anticipates individual client needs to maximize client relationships; develops a portfolio and contact management plan; conducts regular portfolio reviews with the client.
- Engages in proactive sales and business development activities including follow-up, direct marketing, and professional contact with prospects; maintains close working partnerships with other areas of the Credit Union; liaises with branches and investment product suppliers.
- Facilitates referrals and the follow up for financial services not directly sold or delivered by this role; actively refers business opportunities to appropriate operational areas.
- Proactively participates in business development opportunities and community events to grow relationships.

- Develops new business for VantageOne Financial Corp. through home visitations, seminars, demographic studies and surveys.

VantageOne Team Member:

- Work as a team member with all VantageOne staff to ensure that all clients' needs are met in a timely, cost effective process.
- Assists in the Development and delivery of educational seminars to clients and staff of VantageOne on investment and insurance-related topics.
- Provides coaching and direction to more junior investment staff.

Other Duties as Assigned

EDUCATION & EXPERIENCE

Education:

- High School Diploma/Grade 12 plus 2 years of formal post-secondary education or equivalent. Hold a valid Certified Financial Planner (CFP) Designation, Securities License and Insurance License.

And

Job Related Experience:

- 4 -6 Years of job-related experience in investment advice and financial planning services.

Or

- The equivalent combination of education and experience acceptable to VantageOne Financial Corp.

STRENGHTS AND TALENTS

Striving Strengths & Talents	Thinking Strengths & Talents	Relating Strengths & Talents
• Ability to Achieve. • Desire to Succeed. • Competent • Committed to be of Service to Others. • Ethical • Available	• Focused • Disciplined • Able to Arrange. • Responsible • Problem Solving Ability • Committed to Accuracy	• Empathetic • Caring • Team Player • Ability to build and sustain relationships. • Partnership and Advice Focused • Positive Attitude

PHYSICAL REQUIREMENTS

Physical exertion - Minimal which includes stooping, reaching, pushing, pulling and/or lifting.

Visual attention – Constant more than ¾ of the time this may include intense reading of documentation or data, close monitoring of computer screens or detailed work.

Travel – Regular between ¼ and ½ of the time. Travel either day to day or overnight on VantageOne business is required of this position Vehicle and valid licence is mandatory.

Manual Dexterity – Frequent between ½ and ¾ of the time this includes computer keyboarding or mouse work for a significant portion of the workday.

NATURE OF SUPERVISION

Immediate Supervisor	**Vice President, Wealth Management**
Supervisor Responsibility Level	**No Supervision**
Positions Supervised	**None**