NOW HIRING

VantageOne CREDIT UNION

Career Opportunity

Internal/External Advertisement August 25, 2021

Part Time Administrative Assistant

VantageOne Financial Corp.

If you are an enthusiastic people person with a demonstrated track record of success in a wealth management administration role, we should talk!

POSTING NUMBER: IA/EX – 2021-23

CLOSING DATE: Until Filled

STARTING RATE: **$22.25** per hour

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 (IA/EX -2021-07) in subject line of email.

We are seeking an experienced candidate to fill the **Part Time role of Administration Assistant** within VantageOne Financial Corp, a wholly owned wealth management subsidiary of VantageOne Credit Union.

This position is the first point of contact for VantageOne Financial Corp. clients, providing administrative support to financial planners. This position is expected to be available for coverage relief of the full time Administrative Assistant roles as required.

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're 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.

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

.

POSITION DESCRIPTION

POSITION TITLE:	**Administrative Assistant**
BUSINESS: UNIT/DEPARTMENT:	**VantageOne Credit Union VantageOne Financial Corp.**
LOCATION:	**North Vernon**
REPORTS TO:	**Vice President, Wealth Management**

PURPOSE OF POSITION

To provide administrative support to the Financial Advisors and assist in creating an exceptional client experience for VantageOne Financial Corporation.

ROLES AND RESPONSIBILITIES

Administrative Assistance to Financial Planners

- Greets clients in person and ensures they are made welcome with offers of beverages, seating and reading materials until their appointment.
- Greets clients by phone or electronic communications, resolving questions or issues independently or through referral when necessary. The client should always be made to feel they are our priority.
- Manage and organize advisor schedules to make sure calendar is reasonably full; review appointments, occur regularly, unscheduled referrals and rescheduling takes place efficiently.
- Maintains up to date data base of clients, referrals and prospects.
- Provides administrative support to planners – detailed administrative completion of preparatory paperwork required by planner, prepares new files with necessary documents in advance of interview, including materials needed from multiple sources.
- Provide appropriate paperwork, applications and prospectuses to planner in a timely manner.
- Timely review of planner post-meeting notes; processing all paperwork for accuracy and completeness with appropriate diary notes for follow up as required.
- Maintains accurate client files,
- Process investment and insurance transactions/paperwork
- Reviews and proofreads planner documentation.
- Posts transactions on our current software and follows up that transactions have settled as agreed. Reconcile trades, accounts, follow up and account openings.
- Utilizes third party websites for daily administrative function.
- Collects information from multiple suppliers online.
- Extracts various lists of necessary information such as upcoming investment maturities for telephone and electronic mail out approaches.
- Maintains office supply inventory including industry forms and documents, sales literature and office supplies.
- Arranges all mail and courier activities. Organizes and distributes correspondence which arrives through postal mails, emails, faxes etc.
- Produces and distributes correspondence, memos, letters, faxes and forms.
- Coordinates all office equipment is operational and facility maintenance and operation.
- Ability to manage interruptions and assess situations to determine the importance, urgency and risks, and make clear decisions in the best interest of VantageOne.
- Ability to organize tasks and work independently when given overall goals and expectations.

Other Duties as Assigned

EDUCATION & EXPERIENCE

Education:

- High School Diploma and 1- 3 years post-secondary education in business administration.

And

Job Related Experience:

- 1 - 3 Years in an administrative support position or office manager with a financial institution/credit union or financial planning office.

Or

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

SKILLS AND KNOWLEDGE

1. **Accounting**
Familiarity with daily processes of processing transactions and general reconciliation. Preparation and reconciliation of financial summaries and statements. Ability to understand and explain client statements and follow up on transactions until successful completion.

2. **Administrative Processes**
Working knowledge of administrative processes, policies, procedures and practices as they relate to the administrative duties of an office. Also requires familiarity with Credit Union processes.

3. **Communications**
Working skill and knowledge of professional verbal and written communication skills required to liaise with clients, staff and suppliers effectively.

4. **Core Products and Services**
Familiarity of Credit Union products and services to facilitate enable identification of x-referrals to other VOFS services.

5. **Specialized Products and Services**
Familiarity of financial and insurance products and services to provide appropriate administrative support to the Financial Planners. Including a familiarity of wealth management products and services including RRIFs, self-directed RRSPs, RESPs, estate planning, insurance sales documentation and/or administration, financial planning and mutual funds and securities. Sufficient knowledge of the products and services to complete documentation or make a referral of direct inquiries.

6. **Regulations/Legislation/Credit Union System**
A working knowledge to ensure administrative compliance for stakeholders; FICOM, Insurance Council, Investment Dealer Association along with supplier marketing and trademark application to promotional materials. Administers licensing requirements for people and premises with appropriate governing bodies.

7. **Insurance**
A familiarity of specialized insurance products such as life and annuity to provide appropriate administrative support of sales documentation and/or the administration of documents for the Financial Planners.

8. **Computer-Based Systems Operation**
Working knowledge of online supplier software and sites, Microsoft Office, CRM, and financial wealth management software for the purpose of retrieving, updating and manipulating information on a computer including: PC-based systems incorporating word processing, accounting, spreadsheet, database, and internet applications; electronic funds transfer.

9. **Marketing**
Familiarity with various aspects of marketing coordination, including initiatives in mass member communication, seminar organization, brochure updates, newsletter compilation, Ask an Expert Sessions and other related special presentations.

10. **Sales and Service**
Familiarity in this area is required in this position as it refers to the application of customer service needs including analysing needs and identifying opportunities for cross selling, referring potential business opportunities to specialist staff.

Strengths 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- Occasional less than ¼ of the time 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 – Minimal Travel. Travel either day to day or overnight on VantageOne business is not required in this position.
Manual Dexterity – Frequent between ½ and ¾ of the time this includes computer keyboarding or mouse work for a significant portion of the work day. 40 Wpm Keyboarding Skill.

NATURE OF SUPERVISION

Immediate Supervisor	**Vice President, Wealth Management**
Supervisor Responsibility	**None**
Positions Supervised	**None**