NOW HIRING

VantageOne CREDIT UNION

Career Opportunity

TYPE: External Advertisement

DATE: January 3, 2023

ROLE: Full Time Financial 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 2023 - 01

CLOSING DATE: Until Filled

HOW TO APPLY: Please **email** a resume and cover letter to HR@vantageone.net.. Please indicate the advertisement number (EX -2023-01) in the subject line of email.

About the role: The Financial Advisor is a key Wealth Management role. In this position the incumbent has the responsibility to grow the Wealth Management business by providing financial planning advice, gathering external assets, acting on internal referrals and managing a portfolio of relationships.

The successful candidate will have current licensing on the MFDA platform and an active license for life, accident & sickness insurance sales. A Certified Financial Planner designation is preferred but will be required within two years of hire.

We are looking for someone experienced, with enough knowledge to handle the needs of High-Net-Worth clients as our ultimate goal is succession planning for a senior advisor book. We would welcome an independent advisor with a book looking for more support, teamwork, and business opportunities.

This is an opportunity to earn exceptional income with a guaranteed base and a comprehensive employee benefits package including health and disability benefits with a 10% employer paid Group RSP plan after tenure qualifications have been satisfied. Advisor operating expenses are paid including:

- Professional office and equipment.
- Licensing support includes renewals, ongoing education costs and professional insurance.
- A full technology package including laptop, printer, scanner, dual screens, and dual authentication software to protect client information.
- Professional Financial Planning Software, fund analysis tools and CRM system.
- Digital client files and DocuSign system.
- Support with marketing costs for seminars and networking.

This position will receive the benefits of working with a dynamic branch team including fully trained administrative support to help you manage client records and transactions and assistance in keeping advisor calendars full of meaningful appointments. You can count on a steady stream of referral business from our branch partners on which to build your practice.

We are also coming into a time of growth and change and there will be significant opportunities for succession in key roles in our organization. If you want to live in the Okanagan and develop a career in Wealth Management this is an amazing opportunity – it all starts with a conversation.

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 increased 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 have four branches located in Vernon, Armstrong, Peachland, and Arrow Lake.

VantageOne Financial Corp. is the Wealth Division of VantageOne Credit Union providing full financial planning services to our clients out of our central office in North Vernon. We offer market-based investment options, risk products, group insurance solutions and retirement planning products. Our team of talented professionals is client focused and committed to creating meaningful financial advice for all our clients.

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

JOB DESCRIPTION

POSITION TITLE:	**Financial Advisor**
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 " To be Extraordinary" 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 VantageOne Financial Corporation guidelines.
- Responsible for ensuring all annual licensing requirements and learning activities and other continuing education requirements are completed annually to maintain Certified Financial Planner designation.

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 Insurance license.

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, Mutual Funds 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.

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 - 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 work day.

NATURE OF SUPERVISION

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