

JOB POSTING

Investment Relationship Officer

INVESTMENT RELATIONSHIP OFFICER (CONTRACT – MAT LEAVE COVERAGE) TURTLEFORD CREDIT UNION

We are looking for Deposit Team Staff

Position Overview:

The Investment Relationship officer is accountable for creating and presenting a consistently applied investment message to the investment community on behalf of Turtleford Credit Union. They market their products and services by way of telephone sales, in-person visits and sales leads.

Investment Relationship Officers are responsible for conducting the administration of investment products and services as well as market and sell financial products and services to potential and existing members.

They may also prepare various reports and correspondence, maintain files and databases and verify financial data. Responsibilities include providing strategies and suggestions to clients. Investment Relationship Officers also provide administrative support in large offices, performing work such as organizing records, opening and distributing mail and answering telephone calls.

KEY RESPONSIBILITY AREA

The following is intended to illustrate the type and level of work typically performed in this role and is not intended to be a comprehensive description of duties performed.

- Investments
 - Terms (In Branch)
 - Short Term
 - Long Term
 - TFSA, work with Concentra
- Retirement Plans
 - RRSP
 - RRIF
- Education savings
 - Work with Concentra
- Reporting
 - Year End
 - Monthly
- Client Care
 - Providing Strategies for Savings
 - Investment Suggestions to Clients
 - Verify Financial Data
 - Correspondence / Maintenance of Files / Verify Data
 - AML and Legislative Compliancy

ESSENTIAL FUNCTIONS AND BASIC DUTIES

Assumes responsibility for building relationships with members and employees. Gives effective, accurate service to members and employees.

- a. Evaluate the member's needs for financial services, assess the objectives and goals. Develop a strategy to implement.
- b. Develop and maintains long-term relationships based on trust and respect for the members.
- c. Develop and maintains excellent member service to help the member "Save Better".
- d. Periodically meets with members to review and update client needs ensuring investment objectives and goals are progressing according to plan. Meetings take place depending on clients need established by the representative.
- e. Represents the credit union in relationships with business members, industry organizations, regulatory bodies, and other key outside parties.
- f. Proactively market and supports all aspects of Turtleford Credit Union Limited.
- g. Identifies and develops relationships with partners of Turtleford Credit Union Limited.
 - Concentra
 - Credential

Assumes responsibility for performing efficient, effective, accurate service to members.

- a. Keeps current on investment products and services offered.
- b. Follows all rules and regulations set by the credit union, FINTRAC, etc., in accordance with policies and regulatory requirements.
- c. Addresses and resolves problems and challenges.
- d. Works with the branch for cross selling opportunities.
- e. Provides regular feedback to members, employees, credit union General Manager, regarding sales practices and business development initiatives.
- f. Phone calls are promptly returned.
- g. All reports, records and documentation are complete, accurate and timely.
- h. Develops and/or provides input on processes to aid the credit union in providing consistent service to members, and the completion of all required reporting. Ensures at least one person in the office has access to said processes/knowledge to provide seamless service in the event of absence.

Assumes responsibility for establishing and maintaining effective credit union initiatives.

- a. Sets and keeps consistent office hours at branch.
- b. The credit union professional reputation is projected and maintained.
- c. Supports credit union mission and vision.
- d. Supports all product and campaign launches.
- e. Drive investment and credit union initiatives.
- f. Follows through with sales goals.

Assumes responsibility for related duties as required or assigned.

- a. Ensures work area is clean and member information is secure.
- b. Completes all required reporting
- c. Performs related clerical duties as required.
- d. All other duties as assigned.

Hours:

This will be a contractual Full Time Position for Maternity Leave coverage (12 – 18 months).

QUALIFICATIONS:

- A post-secondary education.
- At least 2 years of investment related experience in a fast-paced professional sales role.
- Understanding of regulatory and compliance policies and procedures
- Strong organizational and time management skills
- Excellent communication and interpersonal skills
- High levels of ownership, accountability and initiative

We look forward to hearing from you: 15 October 2021

Please submit cover letter and resume to:
Turtleford Credit Union
Attention: Holly Matias, Office Manager
Phone: 306 845 2105
Email: holly.matias@turtleford.cu.sk.ca

We appreciate and thank all the applicants in advance for their interest in this position. Only those under consideration will be contacted.