We're hiring a Financial Planning Assistant!

Do you have a passion for helping people and a reputation for going above and beyond? You might have what we're looking for to join our team in the Boundary region as a Financial Planning Assistant. The position is responsible for supporting the Financial Planners and building strong relationships with our clients. The role needs someone who is a team player, highly organized and resourceful, excellent critical thinking skills, strong attention to detail, and is comfortable in an entrepreneurial environment. The primary location is our gfcu MoneyWorks (Grand Forks, BC) office however the successful candidate should be prepared for potential travel in the West Kootenay area.

Key Responsibilities

As one of the first friendly faces who greets clients in the office, the Financial Planning Assistant is a client experience champion, who proudly responds to client inquires, carries out transactions and conducts outreach activities. The Assistant is also entrusted with various day-to-day administrative support activities including maintaining supplies and inventory of collateral, and coordinating marketing initiatives.

The Financial Planning Assistant is instrumental in developing strong internal and external relationships and works closely with suppliers, partners and credit union colleagues to deliver best in class service to our members.

As a licensed mutual fund representative, the individual adheres to all industry requirements for ongoing education, training and compliance.

A Day in the Life

While providing exceptional service and building strong relationships with clients, day-to-day activities can range from:

- Responding to client inquiries on existing portfolio, providing investment information, or processing buy-sell orders
- Assisting with the opening of client accounts and complete account maintenance
- Contacting clients to book appointments or provide service follow-up
- Maintaining files, records and documentation, as required by regulatory authorities
- Assisting in the distribution, maintenance, verification, completion and filing of financial planning records and reports
- Prepares a variety of internal and external correspondence
- Identifying opportunities for other lines of business and ensuring an effective referral process for incoming and outgoing referrals

Qualifications & Skills

- Highly organized, detailed and accurate
- Is proactive and demonstrates initiative
- Takes ownership of all work and sees projects, transactions and daily work through to effective and timely completion
- Demonstrates strong interpersonal and written communications skills

- Delivers exceptional customer service and has the ability to build relationships
- Working knowledge of Microsoft Windows applications in the areas of Excel, Word, Maximizer and Outlook - functional knowledge of Maximizer CRM and industry specific programs such as Univeris and Virtgate is an asset
- Minimum of 3 years' experience in a financial institution or investment firm or related roles
- An individual with experience plus education and /or training equivalent to three years will also be considered - education could include a certificate or courses in financial planning, investments, office administration or business administration
- Holds a current mutual fund license or successfully completes all course requirements to obtain mutual fund license within 3 months of hire date
- Experience with life insurance administration would be considered an asset

MoneyWorks* is the wealth management division of partnering credit unions. It includes EKC MoneyWorks owned by East Kootenay Community Credit Union (EKC), Grand Forks Credit Union (gfcu) and Nelson & District Credit Union (ndcu).

Please send your resume to admin@cuwealth.ca