



Member Advisor

Full-time Position

Life Forward

Who We Are

Copperfin is Northwestern Ontario's largest locally owned credit union, with locations in Kenora and Thunder Bay. Our number one priority is to advance the lives of the people and communities we serve. We have a desire to improve the lives of the people who live in our community. We invest in our Members' financial health and strive to ensure we are offering them the best financial tools to reach their goals.

About This Opportunity

We are looking for a responsible, motivated individual for the full-time position of **Member Advisor**. This position will be located at our Kenora Branch.

Reporting to the Branch Manager, the Member Advisor will provide ongoing service delivery and proactively sell retail lending and investment products and services. This position will be responsible for proactively managing an assigned portfolio including:

- Enhancing member relationships to ensure branch and individual goals are met
- Conducting interviews with members to identify lending, deposit and investment needs and making recommendations for solutions
- Engaging members in Life Forward conversations to understand their needs
- Developing portfolios for mutual funds according to member needs and objectives
- Reviewing performance of portfolio annually with members
- Proactively seeking business with both new and existing members through cross-selling initiatives
- Supporting the culture, mission and values of Copperfin Credit Union

What We Are Looking For

- Excellent interpersonal skills including demonstrating approachability, trustworthiness, strong work ethic and a Member first mentality
- Post-secondary degree/diploma, ideally in business or related field preferred
- Minimum of three to five years of lending experience and/or experience gained in the financial services industry
- Must be a licensed sales agent for Mutual Funds
- Proficiency with Microsoft Word and Excel, and the ability to learn new systems
- Knowledge of the credit union system and services with an in-depth knowledge of loan and investment products including RRSP, RRIF, RESP and term deposits
- Strong capabilities in judgment, decision-making and time management
- Willingness to upgrade to keep up to date with changes in the industry relating to job function
- Ability to work in a dynamic team environment

Why Choose Copperfin

We invest in our people so that you are able to learn, develop and are well prepared to support the ever-changing needs of our Members while working towards advancing your career and expanding your skillset. We care about each other and believe in making a difference in the communities we live, play and work in.

- We encourage the growth and advancement of our Team Members. Our Leaders support your development to advance and grow through managing opportunities and coaching.

- We empower our Team Members to be decision makers while providing opportunities to work on unique projects from time to time.
- We offer a competitive health benefits plan including employee pricing and rewards.

To learn more about why our Team Members love working at Copperfin and to get a glimpse of the exciting opportunities we're a part of, check out our [Facebook](#) or [Instagram](#).

About The Salary

The salary for this position will commensurate with the skills and experience of the successful candidate.

Please submit your **cover letter and resume** by **5:00p.m.** on **Friday, December 13, 2024**, to:

People and Culture Team
recruitment@copperfin.ca
Copperfin Credit Union