

Credential

We're looking for a **Client Solutions Officer** to join our **Partner & Client Care** team.

Credential's Partner & Client Care team is the voice of our organization, supporting and strengthening relationships with our credit union partners and their clients by delivering outstanding service experiences. This high-energy team is at the center of the action, with their finger on the pulse of everything happening at Credential – across multiple business lines, product offerings, and investment platforms.

A career with Credential means being part of an organization dedicated to your success. It means belonging to a group of talented individuals who live our values – partnership, innovation and community – every day.

Who you are:

- You're passionate about providing outstanding client service, and you view every interaction as an opportunity to make a difference
- You're adept at anticipating and interpreting client needs, and you provide support that results in exceptional experiences
- You take initiative, seeking out and owning opportunities to improve yourself, your team, and our business
- You take pride in finding creative and meaningful solutions to client challenges
- You're comfortable in a fast-paced environment, maintaining a keen attention to detail even when under pressure
- You thrive in a collaborative environment, sharing your knowledge with your colleagues, and celebrating your successes as a team
- You're a life-long learner, staying current on market events, industry news, and innovative trends and technologies
- You believe that all Canadians should have access to sustainable financial strength, and you're committed to long-term wealth solutions
- You consider the impact of your actions on your team members, our partners, our clients, and the places where we live and work

What your day looks like:

- You're on Credential's front lines, providing client-focused service through multiple communication channels, including phone and email
- You work with a great team who work closely, collaborate, and support each other
- You educate internal and external partners with your high degree of knowledge
- You assist credit union representatives by anticipating their needs, determining solutions, and coaching through appropriate methods
- You help financial advisors, at our partner credit unions, to service their members by reviewing requests for account adjustments
- You support everything from a simple password reset on a client's account, to showing an advisor how to enter trades, and everything in between
- You solve challenging client questions through high quality service and attention
- You maintain a working knowledge of Credential's business lines and products, including mutual funds, securities and insurance platforms
- You embrace our Lean culture by continuous improvement of our processes and staying up to date on projects and ideas

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Your experience and skills:

- 1-2 years' experience delivering outstanding customer service. Experience in a call center or credit union is an asset but not required
- Intermediate knowledge with MS Office Suite
- Excellent verbal and written communication skills
- Fluency in English is required; French language skills is an advantage
- Problem solving skills and ability to take initiative
- Strong attention to detail, organizational and time management skills
- Available to work as early as 6:00am to correspond to market hours

Delivering an exceptional experience for our partners begins with creating a fantastic workplace for our people. We reward innovation, embrace diversity and curiosity, and foster community giving. Our leaders are dedicated to your success, and provide a supportive coaching environment where you can grow your career – and have fun! Our competitive benefits and rewards package helps you lead a full and balanced lifestyle.

Visit **Credential Careers** to learn more.

Who we are:

25 years ago, Canadian credit unions came together cooperatively to build an innovative wealth management offering to serve individual credit unions and their communities. Today, Credential Financial Inc. (**Credential**) is a national wealth management firm providing MFDA and IIROC dealer services, online brokerage, insurance solutions, and correspondent services to over 225 partner credit unions and investment firms across Canada. Our mission is to empower positive growth for all Canadians by providing wealth management leadership, valued advice, and outstanding service.