**Investment Advisor Job Posting**

**Corporate Overview**

As a financial cooperative, we take great pride in caring for our members by providing them with exceptional service rooted in integrity and trust.  We are also committed to serving and investing in our local southwestern Ontario communities and local non-profit organizations, programs and events to help grow and strengthen the communities where we work, play and live.

With 14 branches, 570 million in assets under administration, we deliver a full range of financial services and guidance tailored to meet each member's individual needs.

**The Opportunity**

Mainstreet Credit Union is expanding its wealth management division and has a unique opportunity for a passionate, results-driven, career-minded, licensed Advisor. As the senior Advisor for Mainstreet Credit Union in Sarnia, the incumbent will provide holistic financial planning services and support to Mainstreet's broad member base and professionally represent Mainstreet's wealth management offering in the community.

**Position Overview**

Being a confident, high energy, self-starter, the Investment Advisor provides holistic financial planning advice and solutions to existing and new Mainstreet members and self-sourced customers.

Internally, the Investment Advisor works in close collaboration with the retail branch network and the commercial lending division to establish trusted internal relationships and raise the awareness and knowledge level of Mainstreet employees with respect to wealth management products, services, and strategies --- leading to a steady stream of customer referrals.

Externally, the Investment Advisor will have an active community presence, building Mainstreet's profile in the community as a professional and preferred provider of wealth management products, services, and expertise --- leading to new wealth management and other financial service relationships.

**Education and Designation Requirements:**

* IIROC licensed or licensable;
* Certified Financial Planner (CFP) or Personal Financial Planner (PFP) designation;
* Minimum 5 years’ experience in financial planning/investment sales with the ability to prepare written financial plans in accordance with the six-step financial planning process;
* Superior knowledge of the investment industry and products;
* Comfortable with industry standard financial planning tools/software;
* Post-secondary diploma/degree, ideally in Commerce or Business Administration would be an asset

**Skills, Knowledge and Attribute Requirements**

* Proven networking, relationship building, client acquisition and asset gathering abilities;
* Superior sales abilities (active listening, identifying business opportunities, influencing & negotiating, asking for the business);
* Outstanding communication and presentation skills;
* Ability to work with minimal supervision;
* Commitment to continuous education (CE credits).
* Proven organizational and time management abilities
* Experience with public speaking and comfortable with community engagement activities.

**Compensation**

Mainstreet provides a highly competitive compensation and benefits package. Compensation will be commensurate with experience.

**Why Work at Mainstreet?**

At Mainstreet we believe in ***investing in you*** – whether it is our employees or our incredible members, developing strong relationships is important to us. At Mainstreet we are committed to our members, communities and serving them with excellence and integrity.

If you are some who

* Takes pride in helping others
* Provides an exceptional and memorable member experience
* Strives to improve a member’s day by serving them with warmth, integrity and providing excellent advice and service

Mainstreet may be the right career fit for you!

* Excellent community volunteer programs
* Work-life balance
* Opportunities for career training and advancement
* Generous vacation and benefit program
* Opportunity to work at a cooperative organization with a mandate to make a positive impact locally, nationally, and internationally

Forward your resumes to: [resumes@mainstreetcu.ca](mailto:resumes@mainstreetcu.ca)

Mainstreet Credit Union welcomes applications from people with disabilities. Accommodations are available upon request for candidates taking part in all aspects of the selection process.