Kingston Community Credit Union

Investment Advisor

Corporate Overview

Operating independently, Kingston Community Credit Union (KCCU) is one of Ontario's foremost and highly successful credit unions. Established in 1957, KCCU has a long established history of Investment strength, profit sharing and providing a cooperative and nurturing working environment. With a membership base of over 12,000, KCCU is among the Ontario's most prosperous, best capitalized and strongest co-operatively managed credit unions. Through our 4 branch network and 40+ employees, KCCU offers a full range of in-branch and online retail banking and commercial products and services, and provides tailored solutions through member-focused, relationship-based advice.

The Opportunity

KCCU is making a significant investment in its wealth management division and has a unique opportunity for a passionate, results-driven, career-minded, IIROC & Insurance licensed Advisor. As the lead Advisor for KCCU, the individual will have the opportunity to work in close partnership with the retail branch network as well as professionally represent KCCU's wealth management offering in the community.

Position Overview

Being a confident, high energy, self-starter, the Investment Advisor provides advanced investment, insurance, and investment planning advice and solutions to existing and new KCCU members and self-sourced customers.

Internally the Investment Advisor works in close collaboration with the retail branch network to establish trusted internal relationships and raise the awareness and knowledge level of KCCU 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 KCCU's profile in the community as a professional and preferred provider of wealth management products, services, and expertise --- leading to new wealth management and banking relationships.

Education and Designation Requirements:

- IIROC licensed or licensable;
- LLQP Life, Accident, and Disability Insurance licensed or be willing to pursue the accreditation;
- 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

KCCU provides a highly competitive compensation and benefits package

Please forward your resume or LinkedIn Profile to Shailesh Godse at sgodse@credential.com, or for further information, please contact 905-516-4012.