

# Credential<sup>®</sup>

## The Opportunity

We're looking for an **Administrator** to join our transaction services team in the **Operations** department.

Credential's Operations team is the core of our organization and are the go-to people for getting stuff done. This dynamic and ambitious team strives to continuously improve and provide exceptional service by supporting a wide range of stakeholders. This is a great opportunity to get started in the financial services industry and grow your career!

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 a motivated self-starter with the drive to set priorities and manage deadlines
- You take pride in developing a deep understanding of internal business processes
- You're comfortable in a fast-paced environment, maintaining a keen attention to detail even when under pressure
- You take initiative, seeking out and owning opportunities to improve yourself and your team, and our business
- You're a life-long learner, staying current on market events, industry news, and innovative trends and technologies.
- You have a client-centric mindset and strive to exceed partner and client expectations through every interaction
- 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 ensure EFT and cheque redemption batches are processed daily
- You issue mutual fund adjustments, client transfers, government tax remittances and other miscellaneous payments
- You create electronic wires for daily payment to FundSERV relating mutual fund settlements as well as any other wires requested throughout the day
- You use FundSERV to ensure daily settlement totals match and transactions are processed within the deadline
- You set up, match and confirm trades done with other institutions
- You maintain daily settlement reports and request money movement related to the settlement of transactions
- You run reports to identify all trade exceptions and investigate all exceptions with fund companies and correct on the system and/or advise partners as necessary
- You embrace our Lean culture by continuous improvement of our processes and staying up to date on projects and ideas

## Your experience and skills:

- 1+ year financial services industry experience; credit union experience an asset
- Successful completion of the Canadian Securities Course and/or the IFIC course is an asset
- Intermediate knowledge with MS Office Suite; experience using Univeris an asset
- Extremely detail orientated and accurate
- Highly self-motivated and results driven
- Problem solving skills and ability to take initiative
- Strong organizational and time management skills

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.

To learn more about us, watch [The Credential Story](#).