



Investment Advisor, GTA (Greater Toronto Area)

We invest in people.

Be part of a banking experience as unique as you are. Tandia Financial Credit Union (Tandia) is seeking a talented and experienced investment professional to join our Wealth Services team on a full-time permanent basis.

You will be based at our beautiful new corporate office in Burlington, Ontario, with travel to downtown Toronto on a regular basis. This role will also involve travel to Tandia's other branches on an occasional basis which are located throughout Hamilton and Halton and in North York. In total travel is estimated to be 20-40% in this position.

Your Work at a Glance

As the main point of contact for Tandia's "Wealth Desk" you will be the key contact for members who are invested in, or looking to invest in mutual fund products. In this role you will also work with the entire Wealth Management team to develop the wealth management business by assisting members with their investment decisions and making investment recommendations. You are an independent self-starter who is confident, results driven and service focused. You will bring with you a proven track record in retirement planning, investment counseling and sales of investment products.

You are a member-focused finance professional looking to take on a solid portfolio of clients and help them grow their investment portfolio. You are able to market Tandia's products and services through the normal course of providing financial advice to our members. You will make referrals within our branch network for lending and other credit union products that fill the identified member need.

As a Junior Manager you will increase member loyalty and market share by meeting the investment needs of members and by providing excellent investment advice. This role is also critical as it supports Tandia's branch location in downtown Toronto at 200 Front Street West and will be key in growing our presence in the Toronto and North York regions.

We are looking for someone with the following:

- Current knowledge of daily market activities sufficient to discuss with clients
- A minimum of 1-2 years of experience in the sales and processing of mutual funds, equities and financial products
- Completion of the Investment Funds in Canada (IFIC) course or Canadian Securities Course (CSC) is required
- Must be registered to sell Mutual Funds (MFDA)
- Completion of, or working towards the Personal Financial Planner (PFP) or Certified Financial Planner (CFP) designations would be considered an asset but is not required
- Understanding of the investment industry, products, and the principles of investment advice / financial planning
- Superior sales abilities (active listening, identifying business opportunities, influencing and negotiating, asking for the business)
- Has excellent communication skills - verbal and written, and possesses strong interpersonal skills; can interact with internal staff and members through multiple means of communication - by phone, email, video conferencing, virtual tools and in person
- Is a self-starter and able to seek out information on their own and work independently
- Well-developed presentation skills
- Teamwork and strong relationship building abilities
- Proven networking and client acquisition skills
- A passion for putting members first
- Commitment to continuous learning
- Strong familiarity with financial planning tools and software
- Proficiency with Windows and very comfortable with Microsoft Office applications such as Excel, Word and Outlook
- Alignment with Tandia's vision and values and demonstrates a desire to be a contributing member of our team, support a positive work environment that promotes service and commitment to the credit union, quality, innovation, integrity, and respect
- Ability to commute to Tandia's Corporate Office in Burlington
- Ability to commute to Tandia's downtown Toronto branch on a regular basis, an estimated 20% of the time
- Ability to travel to Tandia's branches throughout Hamilton, Halton and to North York as required

As Unique as You

We believe that financial institutions should be more accountable to the people they serve; we believe that there's more than one way to measure success; and we believe that our profits should have a positive financial, social and environmental impact on the communities in which we live and work. Actions speak louder than words and we work hard to demonstrate our commitment each and every day.

At Tandia, we recognize that our staff and members are unique - and that matters to us.

As a credit union, living the co-operative principles is a part of our long and rich history.

We invest in our members and our communities with an extensive community investment program devoted to supporting the organizations, events, and volunteers that make our communities stronger.

If you are interested in the position and meet the requirements, please forward you cover letter and resume to careers@tandia.com, quoting the position title in the subject line.