



Assistant, Wealth Management Services - Ancaster

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 professional to join our Wealth Services team on a full-time permanent basis in our branch located in Ancaster, Ontario.

Do you have a talent for being organized and proactive? Do you care deeply about increasing financial literacy to help our members secure a better future? Do you want to be a part of an organization that is proud to treat its members like a neighbour rather than a number?

This might be the role for you.

Your Work at a Glance

As an Assistant in the Wealth Management Services department, you will provide direct support to assigned Investment Advisors. Your role will include regular interaction with our members regarding their Qtrade investment activities – which will be a breeze for you, given you enjoy people interaction and have excellent client service abilities.

In this role, you will be directly responsible for assembling, organizing, processing and submitting a variety of forms, documents and packages as it relates to our members' investments.

You will have the opportunity to utilize your strong communication and interpersonal skills to guide our members through the process while teaming with Tandia's staff and management teams to meet the needs of our members and contribute to the overall success of the Wealth Management function at Tandia.

We are looking for someone with the following:

- Completion of Investment Representative Training program (IRT) through CSI (Canadian Securities Institute)
- IIROC (Investment Industry Regulatory Organization of Canada) licensed, or working toward this is an asset
- 3 to 5 years of industry experience in Wealth Management, Financial Planning an/or Investment Sales
- 3 to 5 years of experience in administration or office support
- Post-secondary degree or diploma with a business, administration or finance focus
- Understanding of the investment industry, products, and the principles of investment advice / financial planning
- In depth knowledge of Qtrade operations and compliance manuals
- In depth knowledge of legislation related to all registered product and tax reporting requirements
- Outstanding communication and interpersonal skills
- Teamwork and strong relationship building abilities
- A passion for putting members first
- Commitment to continuous learning
- Strong familiarity with wealth management software / financial planning tools – Qtrade / Credential experience is an asset
- 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

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.

Tandia is committed to meeting the accessibility needs of persons with disabilities in a timely manner, consistent with the principles of dignity, independence, equal opportunity and integration. Tandia is strongly committed to employment equity within its community and to recruiting a diverse workforce. Accommodation for applicants with disabilities will be provided upon request by contacting Human Resources.