

# FINANCIAL ADVISOR

Are you an experienced and successful **Financial Advisor** seeking an exciting opportunity in a progressive financial institution with a competitive salary, comprehensive group benefits and pension plan? Then consider PenFinancial Credit Union, it's good4you!

For over 50 years, PenFinancial Credit Union, a full-service financial institution with over 11,000 members and 5 branches in Welland and St.Catharines, has provided exceptional service to members. As a senior staff member working with support staff you will:

- Demonstrate personal initiative and take a leadership role in support of the organization's strategic initiatives while working cooperatively with fellow employees.
- Use your expertise and knowledge to fulfill the needs of the members with respect to consumer loans, mortgages, credit card products, lines-of-credit, RRSPs, RIFs, LIFs, RESPs, etc.
- Actively solicit membership growth opportunities through staff referrals, service initiatives, member inquiries and other developmental activities.
- Champion our service and business development culture and participate in all branch campaigns and promotions.
- Maintain a high profile and image as the financial institution of choice in the branch trading area by establishing relationships and business contacts and by assisting other branch staff in finding solutions to member questions and inquiries.
- Identify and respond to members' needs while focusing on building member relationships by exhibiting a commitment to increasing member satisfaction.
- Develop, coach and mentor Financial Coordinator(s) by providing leadership and expertise.

**This progressive position requires a candidate who is a Certified Financial Planner (CFP) licensee or has a Personal Financial Planner (PFP) designation.**

A post-secondary education in business and/or a minimum of 4 years related financial experience, including supervisory and proven business development skills are required. Excellent communication and organizational skills and proficiency in a Windows environment are necessary. Mutual fund and securities licenses are not required.

If you meet the above qualifications and are looking for an opportunity to join a team committed to employees, members and the community, you are encouraged to forward your resume to [hr@penfinancial.com](mailto:hr@penfinancial.com).



**PenFinancial**  
CREDIT UNION

Banking that's **good4you!**  
[www.penfinancial.com](http://www.penfinancial.com)