

Employment Opportunity

Investment Specialist

Radius Credit Union Limited
Torquay & Tribune Branches



We are seeking an experienced, full-time Investment Specialist to be based out of our Torquay & Tribune Branches. Reporting to the Manager of Wealth & Investment Services, the Investment Specialist will deliver financial planning and investment solutions to our members, helping to secure their financial future. Responsibilities include meeting with current & potential members to provide investment advice, relationship management, and administering estate accounts. This position will proactively develop and manage a portfolio of member relationships, growing business through providing exceptional member service, ensuring all legislative, compliance and policy guidelines are adhered to. The Investment specialist will cross-sell the full range of credit union products and submit referrals to other departments or specialists as necessary.

Looking to expand your career? We will consider hiring the right candidate for an Investment Specialist Trainee position. An Investment Specialist trainee must be a motivated individual with some financial education/experience and a commitment to the financial services industry & credit union system. A Trainee will work with our experienced Investment Team and management to kickstart their career. A trainee will also commit to attaining an approved mutual fund license within a specified time period.

Preferred/Ideal Qualifications:

- 2-4+ years of experience
- 1+ years Post-Secondary Education in related field (a combination of education and experience will be considered)
- Mutual Funds License (or willing to obtain)
- Proven success working in a sales, service and goal oriented environment.
- Highly motivated with excellent interpersonal, communication, and time management skills.
- A demonstrated commitment to ongoing professional development.

The Credit Union / Organization:

Radius Credit Union is a rural based community focused credit union with seven (7) branches, assets over \$465 million and nearly 50 employees serving 4700 members. **Radius Credit Union builds relationships by providing financial solutions and supporting its communities.** Employee engagement is valued and there is ample opportunity for growth for career minded individuals.

The Communities:

Radius Credit Union has seven branch locations in Avonlea, Ceylon, Pangman, Ogema, Radville, Torquay and Tribune. We have been serving the area for over 60 years! All branch locations are based in rural southern Saskatchewan Towns and Villages. Each of our communities have varying amenities, recreational facilities and services. With major shopping and service centers within a 1- 1.5 hour drive.

Compensation:

Radius Credit Union offers a competitive compensation package including a 7% matched defined contribution pension plan administered by the Co-operative Superannuation Society, participation in a Variable Incentive Program, a full range of employee benefits including medical, dental, EAP and life/disability insurance.

If you are interested in becoming a part of our team, please submit your resume, in confidence, on or before December 24, 2021 via email or mail to:

Radius Credit Union

Box 339

Ogema, SK S0C 1Y0

Attn: Michelle Leonard, HR & Marketing Coordinator

michelle.leonard@radiuscu.com

Posting will remain open until a suitable candidate has been hired. We appreciate the interest of all applicants; however only those under consideration will be contacted.