

## **Job description**

### **Grow with us**

We are looking for an Investment Advisor to join our successful team at Comtech Fire Credit Union. We are a full service financial institution with four branches, over \$500 million in assets under management and more than 12,000 members across Ontario. Our credit union has been growing strong for over 75 years; our history and experience have provided us with a strong and loyal membership base. Now, with open membership, we are committed to providing financial advice and products in a personalized relationship driven environment. We are small enough to know our members by name and large enough to provide the financial resources comparable to larger financial institutions.

### **Your opportunity**

The Investment Advisor is a passionate, results-driven, career minded, CIRO licensed Advisor who provides advanced investment solutions, and investment planning advice to existing and new Credit Union members, as well as, self sourced clients.

The Investment Advisor will work in close collaboration with our retail branch network to establish trusted internal relationships to foster a steady stream of referrals. As well, manage an existing book of business.

Externally, the Investment Advisor will have an active community presence, building the Credit Union's profile in the community as a professional provider of wealth management products, services and expertise.

### **Education and Designated Requirements:**

- CIRO licensed
- Certified Financial Planner (CPP) or Personal Financial Planner (PFP)
- Minimum 10 years experience in financial planning/investment sales with the ability to prepare financial plans
- Superior knowledge of the investment industry and products
- Comfortable with industry standard financial planning tools/software
- LLQP, Life, Accident and Disability insurance licensed considered an asset
- Post secondary diploma/degree ideally in Commerce or Business Administration

### **Skills, Knowledge, and Attribute Requirements:**

- Proven networking, relationship building, client acquisition and asset gathering abilities
- Superior sales abilities

- Outstanding presentation and communication skills
- Ability to work with minimal supervision
- Proven organizational and time management abilities

**The Comtech Fire Offering:**

We believe in fostering a culture where you stay and build your career, and where your work-life flexibility is supported and encouraged. As a successful and growing organization, we can offer competitive wages, an excellent benefits package and a positive and professional environment. We embrace diversity and inclusion and value the uniqueness every individual brings to our workplace, where being your whole-self enriches our member and employee experience.

If you require accommodation during the recruitment and selection process, please email [shelley.oconnor@comtechfirecu.com](mailto:shelley.oconnor@comtechfirecu.com)