

ABCU Credit Union Ltd. (ABCU) is a full-service open bond Credit Union with funds Under Administration of \$456 million and a staff of 35. We are looking for a motivated and high-performing Director, Wealth to lead our Wealth Management team. Working amongst a team of respected professionals, the incumbent will be a primary resource for investment transactions over a designated value and will provide investment advice to a range of Credit Union clients.

Specific Accountabilities

- Providing high-quality investment and financial planning advice and services to members while identifying opportunities for referrals for other products and services.
- Managing member investment portfolios.
- Proactively seeking new business and growing/increasing existing member investments.
- Working with the Wealth team and branch leadership to support wealth growth to implement annual investment financial plan renewals and support wealth growth in the branches.
- Coaching and mentoring of the wealth team.
- As a member of the Senior Leadership team, work with the CEO on the credit union's wealth strategy and ensure the team seeks to grow market share and optimize financial solutions.

Qualifications Required

The ideal candidate will possess the following qualifications:

- University degree in Commerce, Business or Economics is desirable.
- Completion of Canadian Securities (CSC) and Conduct and Practice (CPH) courses.
- Registration with IIROC.
- Minimum 8 years' demonstrated success in a comparable role.
- Designation as Certified Financial Planner (CFP) is an asset.
- A combination of post-secondary education and work experience will be considered.

At ABCU, growth and development are an important facet of the employee experience, and we encourage all employees to seek opportunities to progress and contribute to ABCU in a meaningful way. Our total rewards program is designed to retain and attract top talent. This includes a competitive compensation, at-risk pay and benefit program.

Interested applicants should send their resume and cover letter to:

general@abcu.ca

We thank all applicants for their interest, however only those candidates selected for an interview will be contacted.