



CORPORATE
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An exciting opportunity exists, for *an experienced Investment Associate* to join our team. ABCU is a full-service open bond Credit Union. Assets \$296 million, loans \$201 million, deposits \$273 million, staff of 32. At ABCU Credit Union Ltd. (ABCU) our culture is based on our passion to be financial professionals dedicated to doing what is right for our credit union and our members.

The Investment Associate (IA) is a key member of the wealth advisory team. The primary responsibility is to provide support to the Investment Specialist portfolios for both the Credential Asset Management and ABCU platforms. Additional responsibilities include; engagement activities to retain and consolidate existing members business to the Credit Union and attract new investment referral opportunities. This position works closely with the Investment Specialist, Credential Securities Advisor, Senior Manager of Member Services and external fund company representatives. This role requires expert knowledge of investment products; a mutual fund license is preferred.

This role is part of the overall branch team and works out of multiple locations. While not required to be on the branch schedule, this role may be required to take on temporary duties when dealing with any short term urgent issues.

Experience Required

- Post-secondary degree or diploma preferred.
- Comfort and ability to work with a high level of detail/accuracy.
- This is predominantly a self-managed role.
- Proficient use of Microsoft Office Suite (Word, Excel, Outlook).
- Ability to work efficiently without sacrificing accuracy is essential.
- Three to five years of job-related/industry experience.
- Completion of the Personal Financial Services Advice (PFSA) offered through Canadian Securities Institute
- Completion of the IFIC Mutual Funds course offered through the Canadian Securities Institute
- Canadian Securities Course (CSC) or Canadian Investment Funds Course to support MFDA would be an asset.
- Completion of CUIC General Studies Program preferred or working towards (may be waived depending upon position).
- A combination of post-secondary education and work experience will be considered.

Interested candidates please provide a cover letter, salary expectations and resume to:

Cindy Bennett, ABCU Credit Union
cbennett@abcu.ca

ABCU Credit Union thanks all applicants for their interest; however, only those selected for an interview will be contacted. Closing date: This position will remain vacant until a suitable candidate is identified.