



CORPORATE  
5007 50 Avenue  
Beaumont, AB T4X 1E7  
P: 780-929-8561  
F: 780-929-2999

An exciting opportunity exists, for *an experienced Investment Specialist* to join our team. ABCU Credit Union Ltd. (ABCU) is a full-service open bond Credit Union. Assets \$263 million, loans \$197 million, deposits \$240 million, staff of 32. At 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 Specialist is a key member of the wealth advisory team. The primary responsibility is to actively manage a portfolio of investment members 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 member growth. This position works closely with the Investment Associate, Credit Advisor, and Director, Wealth Services. This role requires expert knowledge of investment products, a mutual fund license and the ability to make unbiased investment recommendations by:

- Using your strong relationship building and networking skills to build connections, generate leads, promote and deliver investment awareness to all members
- Collaborating with different branch teams to build relationships and provide members with personalized investment advice and comprehensive financial planning support.
- Dealing with member complaints and problems quickly and effectively.
- Being current and having superior knowledge of all investment products offered, policies and procedures.
- Providing advice based on a holistic approach by understanding members financial goals and needs.

#### **Experience Required**

- Post-secondary degree or diploma in Finance (or related field) required.
- Canadian Securities Course (CSC) or Canadian Investment Funds Course to support MFDA required.
- 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.
- Six to ten years of job-related/industry experience.
- Completion of the Personal Financial Services Advice (PFSA) an asset
- Completion of CUIC General Studies Program an asset.



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

Janavi Corson, ABCU Credit Union  
jcorson@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.