



## CORPORATE

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

An exciting opportunity exists, for *an experienced Portfolio Manager* to join our team. ABCU is a full-service open bond Credit Union. Assets \$299 million, loans \$209 million, deposits \$276 million, staff of 37. 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 Portfolio Manager is responsible for building, maintaining, and deepening relationships with members who are on default portfolio through interactions by phone, online or email in an enthusiastic and proactive member focused manner. This role is responsible for delivering an advice based experience to our members by understanding their financial needs and goals and subsequently recommending member solutions for all of their personal banking needs. They must be well informed of every product and service offering and know how to educate and resolve the member's needs and be a master at introducing members who qualify to our Advisory team. This role works closely with the advisory team and contact centre to ensure that member's needs are met and referrals are taking place.

Use your strong relationship building and networking skills to build connections, generate leads, promote and deliver investment awareness to all members through:

- Be current and have superior knowledge of all products offered, policies and procedures.
- Use your expertise to identify opportunities to further consolidate member's external financial business thru member awareness and education.
- Grant consumer loans, line of credit and overdrafts within established limits or recommend for approval to credit risk management. Understand and prepare your own documentation for any new sales.
- Master the wealth and commercial product suite and seek every opportunity to refer to Investment Specialist/CSI Investment Advisor and commercial services.
- Work with in-branch advisors and teller supervisors to assist in any signing requirements on documentation.
- Deliver a consistent member experience with every interaction by following a standard process that seeks to understand member investment objectives, risk tolerance to determine the appropriate asset allocation models and provide evidence of member conversations through effective charting notes.
- Measure your success through both achievements in net growth and member satisfaction.
- Focus on what you can do to ensure success is achieved at the corporate level, your level and the member level.
- Achieve or exceed annual targets.

### Experience Required

- Post-secondary degree or diploma required.
- Comfort and ability to work with a high level of detail/accuracy.
- Proficient use of Microsoft Office Suite (Word, Excel, Outlook).
- Ability to work efficiently within a high member engagement role without sacrificing accuracy.
- Five years of job-related/industry experience preferably in a lending environment.
- Canadian Securities Course (CSC) or Canadian Investment Funds Course to support MFDA is an asset.
- A combination of post-secondary education and work experience will be considered.



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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.