



## **Associate, Member Solutions – Acton (Part-Time)**

### **We invest in people.**

Be part of a banking experience as unique as you are.

Tandia Financial Credit Union (Tandia) is seeking a passionate relationship builder to be a part-time Associate based in our Acton branch. This permanent position will involve working at multiple branch locations including Georgetown, Milton, and Burlington however, initially the work location will be 350 Queen Street in Acton and the work hours will vary between 18-24 hours per week, Monday through Friday with occasional Saturday shifts.

Do you have a talent for inspiring people and leading by example while helping families meet their financial goals? Do you care deeply about increasing financial literacy to help our members secure a better future? Do you want to be a part of an organization that is proud to treat its members like a neighbour rather than a number?

If you answered Yes, then you are right for Tandia, and we'd like to meet you.

### **Your Work at a Glance**

In this role, you will be a vital part of our in-branch team, by providing a full range of services to our members including responding to members' inquiries, analyzing members needs, processing member transactions (cash and other general services) and actively soliciting new business by following up on staff referrals, assigned member contacts and cross selling Credit Union products to our members. The Associate is an integral part of growing our business and increasing our membership.

With your knowledge you will be able to effectively up-sell and cross-sell Tandia's on-book investment options. For more comprehensive financial planning needs, you'll be able to spot the opportunity and refer the member to one of our skilled advisors or other members of our Wealth Management team.

Excellent member service is a strategy for most financial institutions, but for Tandia, it's a part of our DNA.

### **We are looking for someone who:**

- Has completed a degree / diploma in the field of business or commerce – or has equivalent work experience
- Has a minimum of 1 to 4 years work experience in a service and selling role in a financial institution
- Has knowledge of the financial services industry and a solid grasp of products and services
- Has knowledge of financial analysis and mathematical calculations such as ratios, amortization schedules and more
- Has knowledge of investments including Registered plans
- Pays attention to details, no matter how big or small
- Is highly organized and able to manage multiple tasks and deadlines
- Has strong customer service and communication skills and the ability to work well with a wide range of customers by all means of communication including e-mail and telephone
- Is proactive, going the extra mile to support our members
- Is a team player, always willing to jump in and help other team members
- Is able to identify and develop opportunities with our existing members and actively strive to increase our member base
- Is comfortable working between 18 and 24 hours per week including evenings and Saturdays to support the operating hours of the branch
- Has reliable transportation and is comfortable with occasional shifts at Tandia's nearby branches in Georgetown, Milton and Burlington

### **As Unique as You**

We believe that financial institutions should be more accountable to the people they serve; we believe that there's more than one way to measure success; and we believe that our profits should have a positive financial, social and environmental impact on the communities in which we live and work. Actions speak louder than words and we work hard to demonstrate our commitment each and every day.

At Tandia, we recognize that our staff and members are unique - and that matters to us.

As a credit union, living the co-operative principles is a part of our long and rich history.

We invest in our members and our communities with an extensive community investment program devoted to supporting the organizations, events, and volunteers that make our communities stronger.

**If you are interested in the position and meet the requirements, please forward you cover letter and resume to [careers@tandia.com](mailto:careers@tandia.com), quoting the position title in the subject line.**

Tandia is committed to meeting the accessibility needs of persons with disabilities in a timely manner, consistent with the principles of dignity, independence, equal opportunity and integration. Tandia is strongly committed to employment equity within its community and to recruiting a diverse workforce. Accommodation for applicants with disabilities will be provided upon request by contacting Human Resources.

Tandia is committed to providing a safe work environment for employees and has implemented a Vaccination policy which is reflective of government and public health mandates. Currently, upon hire, all Tandia employees are required to complete a COVID-19 vaccination attestation indicating their vaccination status, as required by Tandia's Vaccination policy (HR.08.03). Please note this policy is subject to change and will be reviewed and revised as needed to align with the most current public health guidance and government regulatory frameworks.