



Advisor, Member Solutions – Burlington (Virtual Branch) Full-time, Temporary

We invest in people.

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

Tandia Financial Credit Union (Tandia) is seeking an Advisor to join our team in our Corporate Office in Burlington, ON operating as a virtual branch. This is a full-time temporary role and work hours are Monday to Friday.

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 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 virtual branch team, serving members, promoting upselling and cross selling the full range of lending and investments products. Also actively soliciting new business by following up on all member contacts which are generated, and cross selling products to our members. The Advisor actively participates in all campaigns and promotions to meet growth targets. You will be responsible to process member transactions and process member request for account updates and closures.

We are looking for someone who:

- Successful completion of CUIC – Consumer and Residential Mortgage Lending course
- Successful completion of CUIC – Fundamentals of Personal Financial Planning course
- Previous credit underwriting experience
- O.S.S.G.D. plus 4-6 years job related experience or
- Some college plus 2-3 years job related experience or
- Completed college/university plus one year job related experience.
- Willingness to participate in on-going CUIC (Credit Union Institute of Canada) General Studies Program.
- Is comfortable working full-time hours of 35.5 hours per week to support the operating hours of the business.

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, 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.