



## **Senior Member Solutions Advisor – Milton**

We have an exciting full-time opportunity at our Milton branch.

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 enjoy being part of an organization that is proud to treat its members like a neighbour rather than a number? If you answered Yes, then this role might be a fit for you.

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

The Member Solutions Advisor is a critical member of our branch team who markets the Credit Union products and services, ensuring that members' needs are met.

In branch, the Member Solutions Advisor is the primary resource for actively soliciting new sales opportunities by following up on staff referrals and identifying target areas and subsequent cold calls to capitalize on growth opportunities and meet sales goals.

In our local community, you will be leading by example by supporting our various community outreach programs such as providing warm breakfasts to students in need and participating in seasonal volunteer initiatives with Food4Kids, Heart and Stroke and our adopted schools.

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

- Has successfully completed the CUIC Consumer and Residential Mortgage Lending course
- Has successfully completed the CUIC Fundamentals of Personal Financial Planning course
- Has an in-depth knowledge of investments, including Registered plans
- Has proven ability in member service and selling
- Has previous credit underwriting experience and a background in lending
- Understands the Credit Union philosophies and principles
- Demonstrates excellent communication skills
- Is a team player, always willing to jump in and help other team members
- Pays attention to the details, no matter how big or small
- Is proactive, going the extra mile to support our members
- Is skilled at financial analysis and mathematical calculations such as ratios, amortization schedules and more
- Can identify and promote opportunities related to deposit, investment and various savings products
- Adheres to branch and Tandia policies to ensure compliance with various legislation
- Is able to identify and develop opportunities with our existing members and actively strive to increase our member base
- Has the ability to develop and maintain a strong relationship with our members
- Has supervisory experience and proven leadership capabilities; in the branch manager's absence is able to support the branch operation and take on management duties as appropriate

- Is available to work full-time hours of 35.5 per week, including evenings and Saturdays to support the needs of the branch

**To apply, please direct your cover letter and resume to [careers@tandia.com](mailto:careers@tandia.com) and be sure to quote the job title in the subject line.**

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