

## FINANCIAL PLANNER

Full-time Position



Life Forward

### Who We Are

Copperfin is Northwestern Ontario's largest locally owned credit union with locations in Kenora and Thunder Bay. Our number one priority is to advance the lives of the people and communities we serve. We have a desire to improve the lives of people who live in our community. We invest in our Members' financial health and strive to ensure we are offering them the best financial tools to reach their goals.

### About This Opportunity

We are looking for a motivated individual for the full-time position of **Financial Planner**. This position will be located in Kenora, ON.

Reporting to the VP Advice & Member Experience, the Financial Planner will provide complete financial planning advice and solutions to existing and new members of Copperfin consistent with the corporate vision and objectives. An expert at member engagement, you will be responsible for building a profitable wealth business portfolio while identifying and referring opportunities to other Copperfin team members, including:

- Support members with the development, implementation and accomplishment of their financial plans
- Provide prompt, courteous service to members while delivering a full range of financial services
- Establish trusted internal relationships and raise the awareness and knowledge level of Copperfin Team Members by providing subject matter expertise and/or mentoring, as required
- Participate in community involvement activities, building Copperfin's profile in the community

### What We Are Looking For

- Excellent interpersonal skills including demonstrating approachability, trustworthiness, flexibility, strong work ethic, and a 'Member First' mentality
- Post-secondary diploma/degree, ideally in Commerce or Business Administration would be an asset
- Certified Financial Planner (CFP) or Personal Financial Planner (PFP designation)
- Minimum 5 years' experience in financial planning/investment sales with the ability to prepare written financial plans in accordance with the six-step financial planning process
- Proven history of building a book of business
- MFDA or IIROC licensed
- Superior knowledge of the investment industry and products
- Previous banking and lending experience preferred
- Previous supervisory experience in leading and mentoring others would be an asset
- Comfortable with industry standard financial planning tools/software

### Why Choose Copperfin

We invest in our people so that you are able to learn, develop and are well prepared to support the ever-changing needs of our Members while working towards advancing your career and expanding your skillset. We care about each other and believe in making a difference in the communities we live, play and work in.

- We encourage the growth and advancement of our Team Members. Our Leaders support your development to advance and grow through managing opportunities and coaching.
- We empower our Team Members to be decision makers while providing opportunities to work on unique projects from time to time.
- We offer a competitive health benefits plan including employee pricing and rewards.

To learn more about why our Team Members love working at Copperfin and to get a glimpse of the exciting opportunities we're a part of, watch this [short video](#) or check out our [Facebook](#) or [Instagram](#).

### **About The Salary**

In addition to a base salary, you will be eligible for a variable compensation program, in accordance with Copperfin's compensation program and practices.

Please submit your **cover letter and resume** to:

People and Culture Team

[recruitment@copperfin.ca](mailto:recruitment@copperfin.ca)

Copperfin Credit Union

346 Second Street South

Kenora, ON P9N 1G5

We thank all applicants; however only those selected for an interview will be contacted. Upon request, accommodations are available for all parts of the recruitment process.