



VantageOne  
CREDIT UNION

Career  
Opportunity

**TYPE:** Internal/External Advertisement  
**ROLE:** Full Time Administrative Assistant  
**BUSINESS LINE:** VantageOne Financial Corp.

February 24, 2022

*If you are an enthusiastic people person with a demonstrated track record of success, we should talk!*

**POSTING NUMBER:** IA/EX 2022-05

**CLOSING DATE:** Until Filled

**HOW TO APPLY:** Please **email** a resume and cover letter to [HR@vantageone.net](mailto:HR@vantageone.net)  
Please indicate the advertisement number (IA/EX -2022-04) in subject line of email.

**About the role:** We are seeking a candidate to join our wealth management administration team in our Vernon BC office location. Experience is preferred, but not required, as we will train the right candidate. The role is the first point of contact for clients and is expected to interact with everyone with a pleasant, professional, and friendly attitude providing an exceptional client experience.

This role requires someone with solid computer skills, attention to detail and the ability to multitask. This position is expected to work with various software systems, on the phone, in digital meetings and in person. We have a very fast paced environment with a team of talented, upbeat professionals focused on making sure our clients get the very best.

We offer an outstanding compensation & benefits package including paid vacation time and employer paid RSP contributions. Full training will be provided for this position and our growth rate will support good opportunities for future development.

**Who We Are:**

VantageOne Financial Corp. is a well-established, busy wealth management subsidiary in Vernon BC. We are a wholly owned subsidiary of VantageOne Credit Union. VantageOne Credit Union's history reaches all the way back to 1944 when we opened our first branch in Vernon. Since that time, we're proud to have become a vital part of the local business economy. From the very start, we have seen ourselves as a local business that is deeply invested in our communities.

We are dedicated to the financial well-being of our clients, employees, and communities. Part of what sets VantageOne apart from others is that we offer traditional wealth management services and personal advice in addition to the banking and borrowing solutions offered by the Credit Union.

**We welcome applications from all interested; however, only those selected for an interview will be contacted.**

Learn More About

Life & the Application  
At VantageOne Process

[www.vantageone.net](http://www.vantageone.net)



## POSITION DESCRIPTION

<b>POSITION TITLE:</b>	<b>Administrative Assistant – VOFC</b>
<b>BUSINESS:</b>	<b>VantageOne Credit Union</b>
<b>UNIT/DEPARTMENT:</b>	<b>VantageOne Financial Corporation</b>
<b>LOCATION:</b>	<b>North Vernon</b>
<b>REPORTS TO:</b>	<b>Vice President, Wealth Management</b>

### PURPOSE OF POSITION

To provide administrative support to the Financial Advisors and assist in creating an exceptional client experience for VantageOne Financial Corporation.

### ROLES AND RESPONSIBILITIES

#### Administrative Assistance to Financial Planners

- Greets clients in person and ensures they are made welcome with offers of beverages, seating and reading materials until their appointment.
- Greets clients by phone or electronic communications, resolving questions or issues independently or through referral when necessary. The client should always be made to feel they are our priority.
- Manage and organize advisor schedules to make sure calendar is reasonably full; review appointments, occur regularly, unscheduled referrals and rescheduling takes place efficiently.
- Maintains up to date data base of clients, referrals and prospects
- Provides administrative support to planners – detailed administrative completion of preparatory paperwork required by planner, prepares new files with necessary documents in advance of interview, including materials needed from multiple sources.
- Provide appropriate paperwork, applications and prospectuses to planner in a timely manner
- Timely review of planner post-meeting notes; processing all paperwork for accuracy and completeness with appropriate diary notes for follow up as required.
- Maintains accurate client files,
- Process investment and insurance transactions/paperwork
- Reviews and proof reads planner documentation
- Posts transactions on our current software and follows up that transactions have settled as agreed. Reconcile trades, accounts, follow up and account openings.
- Utilizes third party websites for daily administrative function
- Collects information from multiple suppliers online
- Extracts various lists of necessary information such as upcoming investment maturities for telephone and electronic mail out approaches.
- Maintains office supply inventory including industry forms and documents, sales literature and office supplies
- Arranges all mail and courier activities. Organizes and distributes correspondence which arrives through postal mails, emails, faxes etc.
- Produces and distributes correspondence, memos, letters, faxes and forms.
- Coordinates all office equipment is operational and facility maintenance and operation
- Ability to manage interruptions and assess situations to determine the importance, urgency and risks, and make clear decisions in the best interest of VantageOne.
- Ability to organize tasks and work independently when given overall goals and expectations

#### Other Duties as Assigned

## EDUCATION & EXPERIENCE

### Education:

- High School Diploma and 1- 3 years post-secondary education in business administration.

### And

### Job Related Experience:

- 1 - 3 Years in an administrative support position or office manager with a financial institution/credit union or financial planning office.

### Or

- The equivalent combination of education and experience acceptable to VantageOne Financial Corp.

## SKILLS AND KNOWLEDGE

### 1. Accounting

Familiarity with daily processes of processing transactions and general reconciliation. Preparation and reconciliation of financial summaries and statements. Ability to understand and explain client statements and follow up on transactions until successful completion.

### 2. Administrative Processes

Working knowledge of administrative processes, policies, procedures and practices as they relate to the administrative duties of an office. Also requires familiarity with Credit Union processes.

### 3. Communications

Working skill and knowledge of professional verbal and written communication skills required to liaise with clients, staff and suppliers effectively

### 4. Core Products and Services

Familiarity of Credit Union products and services to facilitate enable identification of x-referrals to other VOFS services.

### 5. Specialized Products and Services

Familiarity of financial and insurance products and services to provide appropriate administrative support to the Financial Planners. Including a familiarity of wealth management products and services including RRIFs, self-directed RRSPs, RESPs, estate planning, insurance sales documentation and/or administration, financial planning and mutual funds and securities. Sufficient knowledge of the products and services to complete documentation or make a referral of direct inquiries.

### 6. Regulations/Legislation/Credit Union System

A working knowledge to ensure administrative compliance for stakeholders; FICOM, Insurance Council, Investment Dealer Association along with supplier marketing and trademark application to promotional materials. Administers licensing requirements for people and premises with appropriate governing bodies.

### 7. Insurance

A familiarity of specialized insurance products such as life and annuity to provide appropriate administrative support of sales documentation and/or the administration of documents for the Financial Planners.

**8. Computer-Based Systems Operation**

Working knowledge of online supplier software and sites, Microsoft Office, CRM, and financial wealth management software for the purpose of retrieving, updating and manipulating information on a computer including: PC-based systems incorporating word processing, accounting, spreadsheet, database, and internet applications; electronic funds transfer.

**9. Marketing**

Familiarity with various aspects of marketing coordination, including initiatives in mass member communication, seminar organization, brochure updates, newsletter compilation, Ask an Expert Sessions and other related special presentations.

**10. Sales and Service**

Familiarity in this area is required in this position as it refers to the application of customer service needs including analysing needs and identifying opportunities for cross selling, referring potential business opportunities to specialist staff.

**Strengths and Talents**

Striving Strengths & Talents	Thinking Strengths & Talents	Relating Strengths & Talents
<ul style="list-style-type: none"> <li>• Ability to Achieve</li> <li>• Desire to Succeed</li> <li>• Competent</li> <li>• Committed to be of Service to Others</li> <li>• Ethical</li> <li>• Available</li> </ul>	<ul style="list-style-type: none"> <li>• Focused</li> <li>• Disciplined</li> <li>• Able to Arrange</li> <li>• Responsible</li> <li>• Problem Solving Ability</li> <li>• Committed to Accuracy</li> </ul>	<ul style="list-style-type: none"> <li>• Empathetic</li> <li>• Caring</li> <li>• Team Player</li> <li>• Ability to build and sustain relationships</li> <li>• Partnership and Advice Focused</li> <li>• Positive Attitude</li> </ul>

**PHYSICAL REQUIREMENTS**

**Physical exertion-** Occasional less than ¼ of the time which includes stooping, reaching, pushing, pulling and/or lifting.

**Visual attention** – Constant more than ¾ of the time, this may include intense reading of documentation or data, close monitoring of computer screens or detailed work.

**Travel** – Minimal Travel. Travel either day to day or overnight on VantageOne business is not required in this position.

**Manual Dexterity** – Frequent between ½ and ¾ of the time this includes computer keyboarding or mouse work for a significant portion of the work day. 40 Wpm Keyboarding Skill.

**NATURE OF SUPERVISION**

<b>Immediate Supervisor</b>	<b>Vice President, Wealth Management</b>
<b>Supervisor Responsibility Level</b>	<b>No Supervision</b>
<b>Positions Supervised</b>	<b>None</b>

**ACKNOWLEDGEMENTS**

<b>INCUMBENT:</b> <b>I have read the attached job description.</b>  _____ Signature                                      Name (print)	DATE RECEIVED:
<b>Vice President, Human Resources</b>  _____ Signature                                      Name (print)	DATE SIGNED:
<b>Chief Executive Officer</b>  _____ Signature                                      Name(print)	DATE SIGNED:
<b>Vice President, Wealth Management</b>  _____ Signature                                      Name(print)	DATE SIGNED: