NOW HIRING

VantageOne CREDIT UNION

Career Opportunity

TYPE: External Advertisement DATE: October 2024
ROLE: Financial Planner, Full Time
BUSINESS LINE: VantageOne Financial Corp.

POSTING NUMBER: EX – 2024- 21

CLOSING DATE: Until Filled

HOW TO APPLY: Please **email** a resume and cover letter outlining your experience and qualifications to HR@vantageone.net

---

At VantageOne, we are neighbors helping neighbors. We have been helping our neighbors since 1944 when our first branch was opened in the North Okanagan. We are driven by a strong set of values that guide our actions and define our commitment to our members, clients, and employees. We are passionate about our Members and Clients, we are Action Driven to explore ways to innovation and simplify our member and client experiences, we take Ownership and Accountable for our actions and we are always striving to Be the Best. In addition, we are dedicated to promoting Diversity, Equity, Inclusion, and Reconciliation (DEIR) in all aspects of our organization.

Our mission is clear, we provide our communities with access to member-focused advice, high-quality financial services, and help our communities grow.

We are seeking a **Financial Planner** capable of building the business by offering financial guidance and support to our valued clients. This role provides an exciting opportunity to advance your career within a supportive, team-oriented environment.

The Role Provides:

- **Guaranteed Base Salary:** We offer a competitive starting annual base salary of $75,000 plus commission. Base salary grows with size of book managed. Commissions are a percentage of production. Our compensation package includes a great benefits plan, paid vacation time, and RRSP contributions without requiring you to invest your own earned income.
- **Seamless Transition:** Step into a well-maintained portfolio, allowing you to hit the ground running.
- **Truly Local:** Our wealth office is located in North Vernon, and you will engage with clients in any of our offices in a professional atmosphere fully supported with central digital client files, technical tools and expert administrative support to service clients and develop business opportunities any way the client prefers; in person, over the phone and digital meetings.
- **Collaborative Environment:** Thrive in our team-oriented work environment, where your contributions are valued and recognized. Enjoy the support of steady referrals from branch colleagues.

Make a Difference: Be part of a team that makes a positive impact on our clients and in the community.

Key Responsibilities:

- Provide personalized financial planning advice to wealth clients based on their unique needs and goals. Engage in proactive sales and business development opportunities to grow your book, enhance your income, and contribute to VantageOne's Vision by developing long term relationships with clients.
- Develop tailored financial plans, including investment, insurance, retirement and estate strategies
- Maintain strong relationships with existing clients while growing your network of clients
- Collaborate with other team members to offer the highest level of wealth service and expertise

Qualifications:

Licenses and Certifications:

- Licensing to sell Mutual Funds
- Life, Accident and Sickness License in British Columbia
- Certified Financial Planner (CFP) designation, or actively working toward completion within 2 years
- We welcome applications from candidates with experience in one or more areas who may be in the process of completing certifications or moving from independent advising and interested in a more team-oriented setting.

Who We're Looking For:

- An energetic business builder committed to improving clients' financial positions and achieve their goals.
- A motivated advisor committed to excellence and ongoing professional development
- A candidate who values community, prioritizes client well-being, and thrives in a collaborative environment
- Someone who is proactive, organized, and ready to bring their skills and knowledge to a progressive, growing organization

If you're ready to take your career to the next level with a supportive and innovative team, we'd love to hear from you!

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

POSITION DESCRIPTION

POSITION TITLE:	**Financial Planner – VOFC**
BUSINESS: UNIT/DEPARTMENT	**VantageOne Credit Union** **VantageOne Financial Corporation**
LOCATION:	**Vernon, BC**
REPORTS TO:	**Vice President, Wealth Management**

PURPOSE OF POSITION

The Financial Planner supports VantageOne's vision by developing valuable long-term relationships with high value clients, pro-actively determining & fulfilling their investment and insurance needs and providing them sound advice with high-quality, tailored financial and insurance solutions to match their financial goals

ROLES AND RESPONSIBILITIES

Financial Planner:

- Regularly meet with clients to identify financial goals, objectives, and other pertinent information
- Complete financial analysis and/or planning to develop strategies for clients and provide advice on wealth management, insurance, tax planning, investment and retirement planning, and estate planning
- Develop positive rapport, and establish meaningful client relationships as a trusted advisor
- Proactively manages client relationships, pursuing internal opportunities/referrals, and external business growth opportunities.
- Identify cross-selling and referral opportunities to other VantageOne partners, achieve referral objectives; develop external leads, build referral relationships within the community.
- Achieves individual sales goals through a focus on seeking diverse investment and insurance solutions for all prospective and current clients.
- Expected to work under minimum supervision; the work is varied and complex; sound judgment is required in choosing from a wide variety of products within VantageOne Financial Corporation guidelines.
- Responsible for ensuring all annual licensing requirements, learning activities and other continuing education requirements are completed to maintain all licensing and designation(s).

Insurance Advisor:

- Proactively identifies clients' needs and provides comprehensive information regarding varying personal and business insurance packages such as Life, Disability, Critical Illness and private family health benefit insurance products.
- Identify appropriate opportunities to utilize solutions such as Segregated Funds, GIAs, Annuities, etc. to help clients achieve their Investment, Income, and Estate-planning objectives.
- Actively manages and develops a portfolio of insurance accounts to ensure clients are covered for personal or business risks and other policy features best suited to meet the clients' needs; works with clients to manage and reduce risk.
- Underwrites a variety of personal and business insurance policies relating to the clients' insurance needs.
- Responsible for ensuring all annual licensing requirements and learning activities and other continuing education requirements are completed to maintain all licensing and designation(s).

Business Development Role:

- Proactively develops and manages a portfolio of client relationships; assesses and anticipates individual client needs to maximize client relationships; develops a portfolio and contact management plan including proactively contacting clients and prospects; conducts regular portfolio reviews with the client.
- Engages in proactive sales and business development activities including introductions, client contact, follow-up, direct marketing, and professional contact with prospects; maintains close working partnerships with other areas of the Credit Union; liaises with branches and investment product suppliers.
- Facilitates referrals and the follow up for financial services not directly sold or delivered by this role; actively refers business opportunities to appropriate operational areas.
- Proactively participates in business development opportunities and community events to grow relationships.
- Develops new business for VantageOne Financial Corp. through home visitations, seminars, presentations, proactive networking, promotions and campaigns, demographic studies and surveys.

VantageOne Team Member:

- Work as a team member with all VantageOne staff to ensure that all clients' needs are met in a timely, cost-effective process.
- Assists in the Development and delivery of educational seminars to clients and staff of VantageOne on investment and insurance-related topics.
- Provides coaching and direction to more junior investment staff.
-

Other duties As Assigned

EDUCATION AND EXPERIENCE

Education:

- High School Diploma/Grade 12 plus 2 years of formal post-secondary education or equivalent
- Hold a valid Certified Financial Planner (CFP) Designation
- CSC, IFC, or equivalent course – Required to hold a Mutual Fund License
- LLQP – Required to hold a Life, Accident & Sickness License

And Job Related Experience:

- 4 -6 Years of job-related experience in investment advice and financial planning services.

Or

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

STRENGTHS AND TALENTS

Striving Strengths & Talents	Thinking Strengths & Talents	Relating Strengths & Talents
• Ability to Achieve • Desire to Succeed • Competent • Committed to be of Service to Others • Ethical • Available	• Focused • Disciplined • Able to Arrange • Responsible • Problem Solving Ability • Committed to Accuracy	• Empathetic • Caring • Team Player • Ability to build and sustain relationships • Partnership and Advice Focused Positive Attitude

PHYSICAL REQUIREMENTS

Physical exertion - Minimal 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 – Regular between ¼ and ½ of the time. Travel either day to day or overnight on VantageOne business is required of this position Vehicle and valid license is mandatory.

Manual Dexterity – Frequent between ½ and ¾ of the time this includes computer keyboarding or mouse work for a significant portion of the workday.

NATURE OF SUPERVISION

Immediate Supervisor	**Vice President, Wealth Management**
Supervisor Responsibility Level	**No Supervision**
Positions Supervised	**None**