NOW HIRING

VantageOne CREDIT UNION

Career Opportunity

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

DATE: November 26, 2024

ADVERTISEMENT NUMBER:	EX 2024 - 24
CLOSING DATE:	Until Filled
HOW TO APPLY:	Please **email** a resume and cover letter to HR@vantageone.net.. Please indicate the advertisement number in the subject line of email.

Company Overview:

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: By building strong relationships with our members/clients, we deliver member/client-focused advice and high-quality financial services, fostering growth for both our employees and the communities we serve.

Position Overview:

As a **Full Time,** Administrative Assistant in our Wealth Management Subsidiary, you will play a vital role in supporting our team of dedicated wealth management professionals. This full-time position is scheduled for 36.5 hours per week, Monday to Friday, and involves working between our two wealth services locations in Armstrong and Vernon BC, with an advanced schedule provided

Key Responsibilities:

- Provide administrative support to wealth management professionals, including handling client communications, scheduling appointments, and managing documents.
- Assist with the preparation and organization of client meetings and presentations.
- Maintain accurate and up-to-date client records and databases.
- Collaborate with team members to ensure efficient workflow and exceptional client service.

Qualifications:

- Excellent organizational and time-management skills.
- Strong attention to detail and accuracy.
- Effective communication and interpersonal skills.
- Proficiency in Microsoft Office Suite.
- Previous administrative experience with a financial institution/credit union or financial planning office.
- Passion for the values of Member Client Obsession, Action-Driven Innovation and Simplification, Ownership and Accountability, and the drive to Be the Best.
- A commitment to Diversity, Equity, Inclusion, and Reconciliation principles and practices.

Why Join VantageOne?

- Be a part of a team that is passionately committed to delivering exceptional client service.
- Opportunity for growth and career development within the company.
- Engage in a collaborative, dynamic, and inclusive work environment.
- Competitive compensation and benefits package. Compensation will be aligned with the candidate's experience and skillset. Monthly salary ranges from $4075.66 to $5231.75.
- Contribute to a workplace that values and prioritizes Diversity, Equity, Inclusion, and Reconciliation.

If you are ready to embrace our values, contribute to our mission of delivering high quality wealth management service to help our communities grow, and play a role in advancing DEIR principles, we encourage you to apply for the Full Time Administrative Assistant position. Join us in our journey to excel, innovate, simplify, and foster a diverse and inclusive work environment.

To apply, please submit your resume and cover letter to HR@vantageone.net. **We welcome applications from all interested; however, only those selected for an interview will be contacted.**

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POSITION DESCRIPTION

POSITION TITLE:	**Administrative Assistant – VOFC**
BUSINESS: UNIT/DEPARTMENT:	**VantageOne Credit Union VantageOne Financial Corporation**
LOCATION:	**Vernon, BC**
REPORTS TO:	**Operations Manager, Wealth Management**

PURPOSE OF POSITION

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

ROLES AND RESPONSIBILITIES

Administrative Assistance to Financial Planners

- Greet clients in person and ensure they are made welcome with offers of beverages, seating and reading materials until their appointment.
- Greet 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 calendars are full. Including review appointments, tasked meetings from CRM hotlists and referrals. Make sure rescheduling meetings takes place efficiently where necessary.
- Provide administrative support to financial advisors including detailed completion of preparatory paperwork required by planner, prepare new files with necessary documents in advance of interview. This may include form retrieval and completion from suppliers and Worldsource
- Process advisor paperwork accurately in a timely fashion for dispatch of transfer requests, uploading of documents to the Doc store in Worldsource and Doxim, create tasks from diary notes for future or follow up actions.
- Maintains robust client records in Maximizer CRM including daily product and task updates for clients, referrals, suppliers, accounts documenting product and prospects.
- Maintains accurate digital client files on Doxim in a timely fashion including uploading documents as they are processed or retrieval when required for reference.
- Reconcile trades, accounts follow up and account openings. Follow up to make sure they have settled as intended, accounts are opened, transactions and transfers completed.
- Arranges all mail and courier activities. Organize and distribute correspondence which arrives through

postal mail, emails, faxes etc.

- 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.
- Respond to information requests from all business partners, including VantageOne Credit Union account managers and Worldsource Financial Management compliance.
- Availability to support occasional marketing events to represent VOF by assisting with client events, marketing and special event mail outs.

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

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 workday. 40 Wpm minimum Keyboarding Skills.

NATURE OF SUPERVISION

Immediate Supervisor	**Operations Manager, Wealth Management**
Supervisor Responsibility	**None**
Positions Supervised	**None**