



## **SunCu Financial** **SERVICES INC.**

**An Exceptional Career & A Vibrant Lifestyle**

**Have it all at SunCu Financial Services Inc.**

Do you dream of working in breathtaking surroundings for a company that values its collaborative friendly culture? SunCu Financial Services Inc., a subsidiary of Sunshine Coast Credit Union, specializes in financial planning, estate planning, investments, annuities and insurance. Sunshine Coast Credit Union, a recent recipient of the Coaching Wise designation, is one of the Coast's largest and well-respected employers, proudly providing financial solutions to over 17,000 members.

You are an analytical, results oriented financial professional with extensive experience in all aspects of lending and portfolio growth management in the financial services industry. Your colleagues characterize you as a "people person" with remarkable skills in creating trusting, respectful business relationships through effective communication and a genuine passion to assist customers achieve their financial goals.

If you would like to join a dynamic team dedicated to cooperative values and superior Member service, this exciting opportunity is the right career move for you. Reporting directly to Executive leadership, the successful candidate will play a significant role in providing financial advice and assistance to Members, while strengthening the overall presence of SunCu Financial Services in the communities it serves.

### **Our client is committed to:**

- Providing an opportunity to work in a collaborative, supportive work environment that is dedicated to aligning, integrating and upholding company values to ensure world class customer experience.

### **What the Wealth Advisor does:**

- Build trusting, effective relationships with customers by proactively identifying their needs and providing sound advice and solutions to achieve their financial goals.
- Educate and advise clients about account, investment, mutual fund and lending products and service solutions that assist them in making informed decisions.

- Collaborate with market-leading professionals in financial planning to ensure clients receive customized and targeted expert advice.
- Leverage technology to drive sales and deliver on client experience.
- Stay current on industry issues and adhere to company security, operational policies, procedures as well as industry and legislative regulations.
- Monitor portfolio to ensure alignment with company objectives while identifying strategies to meet and exceed sales while providing customer service excellence to facilitate retention and growth of business.
- Utilize business network to identify and develop business opportunities and enhance financial growth.
- Travel is required and remote work is possible within the Greater Vancouver area.

**What the successful candidate will bring:**

- You are a results-oriented professional and effective decision maker with a commitment to furthering the reputation of the organization in the community.
- Your positive, adaptable approach equips you with strong relationship building skills and the interpersonal perceptiveness to be an effective team member.
- A minimum of five years' experience in providing holistic financial advice to clients in the areas of financial planning, investment, risk assessment and insurance options.
- In addition, you will hold or are about to complete the Certified Financial Planner (CFP) designation and are licensed to sell securities as well as life insurance within BC.
- Demonstrated ability to develop and maintain effective, long-term client business relationships.
- Motivated, self-starter with a strong entrepreneurial drive to consistently achieve established sales objectives.
- Exceptional organizational, time management and prioritization skills.
- Demonstrated strong work ethic, integrity, and commitment to professionalism.
- Customer-focused with demonstrated commitment to ensuring a high level of customer service and satisfaction.

**In return, what can you expect:**

- Competitive salary and comprehensive benefits package.

**Only candidates already eligible to work in Canada will be reviewed. Only qualified candidates will be contacted.**

If you are interested in applying for this role please send your resume and cover letter by email to [yourfuture@sunshineccu.net](mailto:yourfuture@sunshineccu.net)