

SHAPE

Your Future & Apply Today!

SVCU is looking for a Permanent Full Time Investment Specialist:

The Position

Reporting to the Chief Operations Officer, this position is responsible for the day-to-day delivery of wealth services; including portfolio management and mutual funds. This role will be responsible for providing exceptional service and developing meaningful relationships with our members. The successful candidate will also have responsibility for compliance, business development, teamwork, coaching, and delivering an exceptional member experience.

As a member of the Wealth Management team, the individual will work closely with Financial Services Officers and Member Services team to proactively identify our members' changing needs and collaboratively develop financial solutions. This role is focused on making a meaningful difference in the financial well-being of our members.

The Person

Preference will be given to those with industry related education including mutual fund license, completion of the Canadian Securities course or current enrollment or completion of the Certified Financial Planner designation. Alternatively, highly motivated, detail-oriented candidates with strong communication and analytical skills with business-based post-secondary education are also encouraged to apply. Knowledge and experience with TFSA's, RESP's, RRIF's, LIRA's, LIF's and Group RRSP's is preferred.

The Credit Union

Swan Valley Credit Union is a full-service financial services provider with a mutual fund portfolio of over \$37 million, in addition to balance sheet assets of \$348 million.

Swan Valley Credit Union actively promotes an environment that encourages professional development, teamwork and innovation. All advancing candidates are subject to bonding approval.

Salary will be commensurate with qualifications and experience.

This posting will remain open until filled. Interested candidates can submit a resume and cover letter, in confidence, to:

Roxanne Schneider, Chief Operations Officer

Swan Valley Credit Union
913 Main St. E

Swan River, MB R0L 1Z0

Ph: (204) 734-6837

Email: roxanne.schneider@svcu.mb.ca

Swan Valley Credit Union wishes to thank all applicants for their interest; however, only those selected for an interview will be contacted.