



Position: Financial Services Representative
Company: Meridian Credit Union
Email: maureen.reid@meridiancu.ca
Phone: --
Date Posted: August 20th, 2018
Start Date: As soon as possible
Job Status: Full Time

Position Description:

Purpose of the Job:

As a member of the branch sales team, the primary responsibilities for this position will be to understand the financial needs of our Members and provide the appropriate advice and recommendations. This will include opening new accounts, offering credit, deposit and wealth advice and solutions as well as proactively identifying and promoting opportunities for other Meridian products and services.

In addition this role will be responsible for meeting and exceeding specific individual goals and contributing towards team based business results. This role is expected to proactively engage in revenue generating and sales based activities, foster and deepen Member relationships and refer business to other channels.

Key Responsibilities:

- Within approval limits approve or provide recommendations on credit products based on thorough, accurate and appropriate credit interviewing and underwriting skills
- Provide deposit and wealth advice by identifying and promoting Meridian investment offerings and solutions that fit and meet our Member needs
- Open new Member accounts using account opening strategies
- Develop rapport with Members, identifying Member needs and expectations and align products and services based on the identification of those needs
- Provide Mutual Fund advice and recommendations where suitable
- Engage in revenue generation and sales based activities in order to achieve performance objectives
- Proactively identify and promote referral opportunities with all Members to appropriate partners in retail, wealth, mobile, small business and commercial
- Resolve problems at first point of contact where possible and refer to more complex Member concerns to appropriate parties
- Balance and process daily work in accordance to standard compliance, audit, policies and procedures

Knowledge, Skills and Experience:

- Post-secondary education or equivalent work experience in a financial services sales environment
- Must currently hold or be willing to attain Mutual Fund licensing
- Strong business acumen and financial industry knowledge
- Passion for sales
- Excellent organizational and Member service skills
- Strong technical skills
- Flexible to work all scheduled hours which may include evenings and weekends

Experience the Difference!

Thank you for your interest in Meridian Credit Union. Please note that due to the volume of applications, only those under consideration will be contacted for an interview.

Meridian is committed to providing accommodations for people with disabilities. Should you require an accommodation, we will partner with you to meet your needs.

To apply please visit www.meridiancu.ca/about-meridian/careers

How to Apply:

Submit Cover Letter and Resume - email

Job Site Location:

Penetanguishene

Advertise Until:

Sep 8, 2018

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