

Wealth Advisor

Permanent Full Time, Hybrid; Winnipeg

Starting salary - \$68,223.22 annually

Why should you join our team?

At Access Credit Union, we support a professional and innovative work environment with a corporate culture that uniquely embraces empowerment, accountability, and trust. We recognize and value each employee's contributions to our success, which is why we offer competitive compensation, 100% company paid health benefits, employer-matched pension plan, continuing education, and career advancement opportunities within our credit union.

At Access Credit Union, our values are straightforward:

- Do good
- Be better
- Own it
- Move forward

What will you be doing?

The Wealth Advisor seeks to manage and grow the wealth management portfolio by providing exceptional service to both existing and potential members through the promotion and sale of mutual funds and financial planning services.

Key Responsibilities:

- Seek to improve the financial health of existing and new members, as well as self-sourced clients, by providing a wide range of holistic financial planning services and mutual fund solutions.
- Create and execute an annual business plan to achieve growth goals as outlined on the Wealth Advisor scorecard.
- Identify holistic member needs/goals and refer identified non-mutual fund sales and service opportunities to the appropriate Credit Union experts.
- Retain existing relationships by proactively servicing the assigned wealth portfolio, including the guaranteed investment needs of mutual fund investors.
- Work in close collaboration with the consumer branch network and external centre of influences to establish trusted relationships in order to foster a steady stream of referrals.
- Build the Credit Union's profile in the community as a professional provider of wealth management products, services and expertise.

What do you need?

- Minimum 2-5 years' financial planning or investment advisory experience.
- Valid Investment Funds in Canada (IFC) or Canadian Securities Course (CSC) (must be able to license in good standing)
- Post –secondary diploma/degree, ideally in Commerce or Business Administration is preferred.
- Certified Financial Planner (CFP) or Professional Financial Planner (PFP) is required within three years of start date. The CFP designation is preferred.
- Other wealth related designations are considered an asset (i.e. CLU, Ch.F.C., CIM)
- Superior knowledge of the Financial industry and products

- Valid drivers license as travel will be required as necessary

Are you ready to?

- Be an ambassador for our brand, values and products
- Ensure things get done efficiently
- Go home each day feeling accomplished
- Challenge the status quo
- Build a career
- Continue learning

If you are interested in this position, apply today at [Access Careers](#). Application deadline is May 15, 2025

We welcome diversity, value inclusion, and take pride in our vibrant corporate culture. Our team is a reflection of the members we serve and the communities we live in.

Access Credit Union welcomes applications from people with disabilities. Applicants may request reasonable accommodation related to the materials or activities used throughout the selection process.