

Job Posting

POSITION: Financial Services Officer
DEPARTMENT: Marystown Office
REPORTS TO: General Manager
35 Hours/week Salary based on union contract

Position Summary and Key Result Areas:

Reporting to the General Manager, the FSO will be responsible for:

- Proactively analyzes and acts upon potential opportunities when new accounts are opened and when dealing with new and existing members. Assesses each situation independently to determine the appropriate product or service to further assist/refer the member as well as increasing the credit union's lending/deposit portfolio and use of products.
- Cross-sells members on the benefits of utilizing other credit union services.
- Responsible for the coordination of the new member welcome program, preparation and delivery of correspondence for inactive accounts, changes required to assist members with their financial goals/accounts.
- Daily reporting to Verafin/Compliance.
- Daily balancing of E transfer account, Handling E-Transfer alerts on a timely manner.
- Explains and promotes available financial services such as registered plans and term deposits including TFSA's, RRSPs, RRIFs and RESP's. Responds to customer-owner inquiries and provides information as requested.
- Notifies customers of maturing deposits and options available to them.
- Processes the investment documentation for new investments, renewals, redemptions and transfers including TFSA's, GICs, RRSPs, RRIFs, etc. Prepares and balances daily receipts and disbursements.
- Completes month end reports including, Withholding Tax Remittance, RRSP documents, RRSP contracts, and maturities and retention.
- Processes yearly reports on RRSP and RRIF for Concentra Trust.
- Assists in implementing changes to policies and procedures in the deposit area.
- Provides Income Tax Services to both members and non members.
- Opening new Business Accounts and Personal Accounts.
- Provides administrative support including preparing correspondence and reports; data input; checking reports, maintenance of the filing system; answering telephones; photocopying; faxing and other duties as assigned.
- Assists and back-up Member Service Representatives, as needed.
- Completes other duties as assigned

Minimum Hiring Qualifications and Experience:

The Financial Services Officer will have successfully completed a Business Diploma program and have a minimum of three to five years related experience and/or training in an financial institution; or equivalent combination of education and experience. Experience in the area of communication and promotion is considered an asset.

Competency Requirements:

To perform the job successfully at 100% competency, the incumbent must demonstrate the following competencies:

Adaptability to Change	Information Seeking
Customer Service Orientation	Planning, Organizing and Coordinating
Listening, Understanding and Responding	Concern for Order, Quality and Compliance
Teamwork and Cooperation	Problem Solving and Judgment
Strategic Orientation	Initiative
Results Orientation	Impact and Influence

Technical Competencies:

- Written communications
- Work planning and management
- Strategic Management
- Software proficiency
- Optimizing risk
- Monitoring and compliance
- Marketing
- Managing the workforce
- Knowledge of products and services
- Knowledge of policies and regulatory environment
- Knowledge of financial principles
- Financial accounting
- Decision making
- Business acumen

Apply to: cmullett@ccunl.ca or by fax 1-709-279-3721

Deadline to apply Dec 18th 2024