COMPASS CREDIT UNION
Your financial guide.

JOB DESCRIPTION

WEALTH SPECIALIST | MUTUAL FUNDS INVESTMENT SPECIALIST

FULL-TIME | BRANDON, MB
Monday to Friday - No weekends

THE POSITION SUMMARY / RESPONSIBILITIES

The Wealth Management department includes promotion and sales of investment products from Compass Credit Union, Aviso, Qtrade, and Concentra Financial. This department is accountable for the delivery of quality service and achievement of growth through sales and business development in the branches. Ensures compliance with policies, procedures, and legislation. This in-branch full time position provides advice, direct sales, and ongoing service to members on investment products through the branch channel with a primary focus on mutual fund sales. This position does not provide lending services.

- Will spend 1 day every 3 weeks on rotation at our Erickson branch.
- Holds mutual fund license.
- Provide full-service wealth management and investment advisory services through Aviso, including basic financial plans.
- May develop and manage a portfolio of member relationships; assesses and anticipates individual member needs to maximize member relationships; conducts regular portfolio reviews with the member.
- Assist members/clients to clarify financial goals and objectives in the short and long term by confirming risk tolerance levels, clarifying financial challenges, and identifying opportunities
- Analyze financial information, propose customized investment strategies, and deliver quality products, services, and advice to members within the products we offer such as mutual funds, registered plans, term deposits and estate administration.
- Resolve member/client complaints expeditiously, in a manner satisfactory to the member, the credit union and regulatory bodies (Aviso/CIRO)
- Create and process all sales and portfolio month-end and year-end reports for the credit union, as well as reports from companies such as Aviso, Concentra Financial and CRA.
- Implement appropriate business development methods that supports maintaining and servicing existing members, identifying new opportunities within the current book of business, and developing strategies to grow new business.
- Promote programs and procedures that will contribute to the growth and development of the deposit portfolio.
- Represents a range of credit union deposit, mutual funds, and ancillary products and services in the best interest of the member.
- Act as an information source for mutual funds and train and support team members as required in CCU investment products
- Actively refers business opportunities to appropriate operational areas.

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THE PERSON

As part of the team the successful candidate will work well under pressure, demonstrate attention to detail and excel in delivering exceptional member service. They will possess strong communication, organizational, problem solving and decision-making skills

EXPERIENCE/EDUCATION

- 2 - 3 years of relevant experience or an equivalent combination of education and experience.
- Knowledge of competitive marketplace trends and product offerings.
- Completed, pursuing or must be willing to take Canadian Securities Course (CSC) or IFIC course / IIROC licensed as an Investment Representative
- Some knowledge of risk management and compliance within the financial industry
- Ability to work in fast-paced environment and perform well under pressure
- Attention to detail with high degree of accuracy
- Ability to follow standardized policies and procedures
- Verbal & written communication skills
- Organization skills
- Collaboration & team skills
- Analytical and problem-solving skills

THE CREDIT UNION

Compass Credit Union, formerly Erickson and Crocus Credit Unions, have two branches in Brandon, one in Erickson as well as a majority interest in an insurance agency.

Please send **resume** and **covering letter** by Friday, **March 20, 2026**, in confidence, to:

KIAN BELL
Lead Wealth Specialist | Mutual Funds Investment Specialist
Compass Credit Union | Aviso Wealth
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