

# Credential<sup>®</sup>

Credential Financial Inc. (**Credential**) is the wealth management distribution company for the Canadian credit union system. Our mission is to deliver investment and insurance products and services, expert advice, and innovative wealth management solutions to our credit union partners, their advisors, and their members.

Our continued growth and development has created the need for a Director, Investment Advisory

The Director, Investment Advisory is responsible for the delivery of active advice guidance to support advisors, wealth managers and executives. This will be achieved through direct research and development supported by utilization of relationships with affiliated organizations.

#### **Expected Contributions:**

- Develop and implement an annual Advice plan for the positioning of Credential Financial as the provider of wealth management knowledge and financial planning advice (including mutual funds, securities and insurance) to our partner credit unions. Provide the materials and tools the Advisors require to understand their members' needs and objectives and then provide appropriately positioned investment advice, products and services
- Research, create and distribute investment literature/presentation material to educate credit union Advisors and their members on financial and investment topics, including: timely (weekly) market commentary, investment strategies, business succession planning, and other financial topics. These topics will focus on particular life stages of credit union members, provide value-added sales support for Advisors and position Credential as a thought leader with our client credit unions.
- Solicit topics and receive feedback from prominent credit union Executive and Advisors. Provide information to advisors for their use in the sales process and to build their knowledge base
- Investment Advisory spokesperson to provide strategic guidance in special situations to advisors and sponsors of larger relationships and accounts and act as relationship manager
- Solicit topics and received feedback from RVPs and Sales Development Managers. Work closely within the Product Solutions & Investment Advisory, with Marketing and Communications for the creation and publication of materials, tools and services. Provide regular updates to all internal parties. Work with other internal parties as required
- Gather, consolidate and communicate information from third party sources to support the types and themes of the investment material and tools. Work with third party sources to deliver services, as required
- Cultivate and leverage relationships with external parties who can provide expert-level knowledge on key topic areas
- Review competitive offerings from the credit unions' principal competition: chartered banks, major brokerage and financial planning companies. Materials and tools offered by the competitors and how they have positioned themselves in terms of advice to their clients
- Develop and maintain asset allocation standards and conduct investment risk assessments on the product offering. Establish an education strategy to mitigate potential risk inherent in securities held on the firm's books as well as new offerings in changing market and regulatory environments

#### **Experience & Qualifications Required:**

- 7-10 years in Financial Services with Advisory, Financial Planning and external advice/communications experience
- Strong understanding of financial planning theory and practices
- Excellent verbal and written communication, at both an individual and group level
- Ability to project a highly professional image in a variety of settings/presentations
- Highly developed organizational skills

#### **Education Required:**

- Post secondary degree , MBA or related designation
- CFP preferred, RFP, CSC required
- CFA Charterholder designation or CFA Candidate is preferred

Located in the heart of downtown Vancouver, our vibrant and energetic Head Office staff is dedicated to achieving the mission and vision of **Credential**. Our staff is recognized as the key foundation to our success, and the Company has embarked on a long-term commitment to ensure a culture of productive engagement in achieving corporate objectives.

If you are interested in this opportunity, please apply online at: [www.credential.com](http://www.credential.com).