



Part Time Virtual Advisor Opportunities

DEPARTMENT: Member Relations

Do you love assisting members to provide sound financial advice in all areas of service providing them with the financial confidence they need to succeed in any direction they choose? Do you know your individual contributions make a difference and do you love removing complexity and frustration from people's lives? We are seeking a motivated individual to be part of a high-level group that will thrive with passionate and caring team members who believe in the Crossroads difference and care deeply about our members financial goals and demonstrates these qualities:

- Strong focus on members
- Love to goal set, and feel a sense of ownership for projects from beginning to end
- Curiosity and the ability to question the status quo
- Creative and open minded when looking for solutions
- Loves to collaborate with diverse teams to solve complex problems
- Passionate about efficient execution
- Communication - Build constructive relationships, communicate effectively with internal and external members, and have a great time doing it

Crossroads Credit Union was founded on understanding the real needs of our member-owners, this has been at our core, so our purpose and our value proposition have been developed based on our member-owners voice. Our members are the center and their needs drive everything we do. We want to help our members make decisions at each of their personal and financial "CROSSROADS" and help them chapter by chapter.

The purpose of the Virtual Advisor is role is to "connect" and provide continuing exceptional service to those members not coming into our branches. We want to make it easy and beneficial for Crossroad's members to deal with us, tailored towards what works for them. This position is responsible for providing financial service to members through incoming communication and building relationships by proactively connecting to our members ongoing. This role is to help, assist, support our members on their immediate banking needs through a variety of communication channels. While promoting the Credit Union Brand with excitement and passion, the Virtual Advisor is to provide advice and optional solutions so that our members can efficiently reach their financial needs and goals.

Some of the key responsibility areas of the Virtual Advisor are:

- Recognizing prospecting opportunities for new and existing members through various channels of communication.
- Walking side by side the member through the first year of the relationship, supporting their needs and ensuring they are using the right products and services, spreading awareness of Crossroads values, programs, and initiatives that would benefit the member.
- Educating our members on products and services that support the achievement of our members financial goals with confidence. Ensuring members know how to use the products and services we offer and have matched them with. Right product, right service, at the right time.
- Maintaining rapport with members, meeting their immediate banking needs, and troubleshooting through the variety of digital channels and internal data systems (doing so in a way that is beyond the initial request).

We pledge to know our members better than anyone else to provide the best possible service and advice. We achieve this through developing meaningful relationships. We want to ensure our member-owners' financial lives are better because they entrusted us.

To be considered for this role, we are looking for someone with:

Experience

- Minimum of 1 – 3 years in a similar role with comparable goals and responsibilities
- Post-Secondary education in Finance, Commerce, Business Administration, or equivalent work experience or hold FCUIC Designation
- Completion of the MSR and FSR Accreditation Program

Skills

- Works collaboratively with peers and colleagues throughout the delivery system by sharing best practices and learning's, where appropriate
- You must be inquisitive and passionate about cultivating new relationships, a dynamic, advice-driven person who finds satisfaction in developing and recommending solutions to help our members achieve financial confidence and you must appreciate the value received from lifelong learning.
- Commitment to lifelong learning

Does it sound like we are describing you? If you are not already with us in Crossroads Country, then you need to join us! To us Crossroads Country is not just a place, it's a feeling. A close-knit community of people, regardless of physical location, who through all seasons are united by prairie values. It's about grassroots, hometowns, and cooperation. This feeling of belonging to a family that is always willing to lend a helping hand is part of what makes Crossroads a direction worth choosing.

At Crossroads Credit Union, we ask a lot of our employees, which is why we give so much in return. In addition to your competitive salary, medical/dental/vision plan, and one of the best matching pension plans, we will provide you with perks, including:

- Vacation that increases beyond legislated requirements
- Wellness program
- Work / Life Balance
- Flex Time
- Sick Leave – Duty of Care
- Volunteer Time
- Training & development
- Education Day / Paid Education
- Credit unions perks / free accounts
- Service awards and recognition
- Crossroads Clothing
- Annual bonus based on your results

We want to hear from you!

Please don't delay in submitting your resume to Human Resources. We will begin reviewing submissions immediately and continue until we find the right hire. Our employees are very important to us; our staff work hard, and we are committed to making first-rate hires (just like them)

Please include any relevant certification with your application.

Please forward your Letter of Interest as soon as possible to:

Human Resources
Crossroads Credit Union
P.O. Box 2006
Canora, SK S0A 0L0
E: hr@crossroadscu.ca
F: 306.563.6715