



PARAMA's dedication to supporting Lithuanian's and all Ontarians by providing peace of mind and trusted advice in all of life's moments is an essential part of the Financial Services Advisor role. A growth mindset coupled with an adaptive and resourceful demeanor is table stakes for a collaborative, forward thinking and highly engaged employee.

Part of a highly engaged team of financial service professionals who are committed to providing PARAMA members with an extraordinary member experience. This role requires laser focus and commitment to a proactive approach while being forward thinking every member, every time.

Every member deserves and expects a personalized holistic approach to their banking needs. The Financial Services Advisor (FSA) role requires a growth mindset and an agile demeanor. Initiative and integrity are intertwined expectations of the role. You are a self-starter, are driven and organized and thrive interacting with members!

Our Financial Services Advisors work alongside in house experts and align activities to support the quest for a holistic member relationship. As a senior member of the branch team, you bring an entrepreneurial flair to all activities while putting the members needs first and foremost. Advice and trust form the foundation of the role enhanced by offering large or complex credit and investment advice while proactively identifying and promoting opportunities for PARAMA products and services.

The FSA role is responsible for meeting and exceeding specific individual business goals. Portfolio management with the aim to build and deepen relationships with existing and new members is a focal point of the assigned duties along with referring business to PARAMAs other channels.

Responsibilities:

- Communicate effectively
- Knows the business and the role deeply
- Puts member's needs first
- Leverage a forward thinking, business savvy and growth mindset every member, every time whether it is over the phone, online or in person

- Uncover solutions that are tailored to the member in a seamless service experience
- Provide sound investment and credit advice
- Within approval limits approve or provide recommendations on credit products based on thorough, accurate and appropriate credit interviewing and underwriting skills
- Hold Mutual Fund accreditation and maintain thorough knowledge of the of economic and market conditions
- Onboard new members with the intention of earning the right to their business while leveraging account opening processes
- Originate and expand external centres of influence to optimize sales and service results
- Embrace digital and mobile banking by increasing PARAMA's digital penetration ratios
- Resolve concerns at first point of contact where possible and refer more complex member concerns
- In partnership with branch leadership, champion and implement corporate strategies and programs for the branch
- Develops and maintains a network in the community to enhance PARAMA's visibility and build a strong referral source for new potential business
- Probes to understand member personal banking and credit card needs and integrates marketing promotions and programs into member conversations to provide advice in the best interest of the member
- Develops cross functional relationships
- Demonstrate excellent listening and strong consultative skills
- Maintain discretion and confidentiality to respect members privacy
- Remove systemic barriers to outstanding member experience
- Share PARAMA's commitment to productivity, effectiveness and operational efficiency
- Be an agent of change, help others to embrace it
- Cultivate winning relationships and building trust
- Learn voraciously, stretch you and your team's thinking, share your knowledge and educate others
- Strict adherence to all legal and regulatory requirements

There is an expectation to promote PARAMA Credit Union in the local community by participating in and being involved in community activities or events while demonstrating the company values.

We thank all applicants for their interest in a career with PARAMA however, only those candidates who are selected for an interview will be contacted.