

**Division:** Member Experience  
**Reporting to:** Branch Manager  
**Career Level:** Staff  
**Pay Type:** Hourly

### Job Overview

The Senior Member Consultant role is responsible to provide relevant, timely and accurate financial advice to an assigned portfolio of Members to assist them in meeting their financial goals, and to become the financial institution of choice. Utilizing a team approach, the Senior Member Consultant identifies sales opportunities within their assigned portfolio and ensures these opportunities are fulfilled by utilizing the appropriate resources and teams.

### Role

*In the role, you will be responsible for the following:*

#### **Sales & Service:**

- Responsible for achieving sales targets and goals as set out by the Branch Manager or designee
- Uncover and identify sales opportunities primarily with assigned Members, and other Members as required
- Actively solicit, follow up and cross sell products and services to assigned Members to increase share of wallet and ensure we are their primary financial institution of choice
- Assists with achieving the goals and objectives relating to business development as set forth by the Branch Manager
- Provide the right financial advice based on a thorough understanding of assigned Member's financial goals and develop a financial plan that meets their needs
- Provide relevant and qualified referrals based on business plan and assigned goals to strategic business partners including Wealth Management, Business & Commercial departments
- Complete credit sales to closure, while adhering to terms and conditions of relevant policies and procedures
- Maintain an up to date tracking record of sales, sales results, opportunities, retention, consolidation and acquisition
- Be quick to respond to requests for service from all assigned Members
- Apply FirstOntario Credit Union's sales and service standards with all assigned Members, and other Members as required
- Work primarily with assigned Member to resolve inquiries and/or concerns, and other members as required
- Apply sound service and business judgment in all activities and interactions, and make decisions within prescribed lending limits
- Keep contact diary system up to date with relevant follow up action for assigned Members
- Maintain ongoing activity plan to assist prioritizing sales, service and operational work
- Provide coaching and support to the Member Consultant network and provide additional coaching to other branch employees
- Actively participate and present at branch sales meetings
- Actively participate in creating and executing strategic initiatives in conjunction with the Branch Manager, or designee
- Flexibility to travel throughout regional branches to provide support as required
- Perform other duties as we may need you to do

#### **Operations:**

- Adhere to policies and procedures at all times, as amended from time to time
- Complete work accurately, promptly and fully from beginning to end
- Complete branch opening and closing activities, as required or assigned
- Provide overrides and other such operational work within guidelines outlined in your "Letter of Authority"
- Perform audits and proofing, as required
- Perform actionable requirements associated with control and exception reports (delinquencies, maturing products etc.)
- Consider health & safety as a primary concern to ensure the overall well-being of the branch and members
- Take on the role of Acting Branch Manager, as required
- Perform other duties as we may need you to do

**Required Skills and Qualifications**

- Must have 5-7 continuous years' of experience in the Member Consultant role with FirstOntario or a comparable role at another financial institution
- Must have lending limits as approved by the Credit Department
- Successfully complete the testing for the Senior Member Consultant role
- Must complete other job-related courses and certificates as required
  - MC 1 and MC 2 training or equivalent
  - CU Training or equivalent
- Competent knowledge of Microsoft Office Suite, Temenos Banking System and Criterion or equivalent banking and lending platforms
- Must have superior interpersonal and communication skills
- Inherently demonstrate a high level of integrity and trustworthiness
- Must be able to work well with minimum supervision
- Ability to effectively problem solve to find creative and beneficial solutions
- Be flexible and adaptable to changing priorities
- Ability to share knowledge and best practices
- Must be capable of working as a team player, willing to assist other staff of any location
- Must have a positive attitude and willing to go above and beyond
- Maintain current knowledge of the Financial Service Industry and trends
- Be able to take action in difficult and challenging situations and deal with uncertainty
- Do the right things for the right reasons
- Ability to identify and mitigate enterprise risk factors and ensure compliance with applicable regulations, legislation and FirstOntario policies and procedures

*Accommodations for persons with disabilities are available upon request during the application process.*