Job Title: Wealth Planning Specialist
Location: Surrey British Columbia

About Khalsa Credit Union

At **Khalsa Credit Union**, we are committed to empowering our members to achieve their financial goals while strengthening the communities we serve across British Columbia. As a member-owned financial cooperative, we take pride in delivering personalized financial solutions, fostering long-term relationships, and making a meaningful difference in people's lives.

We are now building out our **Wealth Planning function** in partnership with **Aviso Wealth**, and are seeking a **Wealth Planning Specialist** to join our growing team.

Role Overview

The **Wealth Planning Specialist (WPS)** provides professional and comprehensive financial planning advice to high-value members across assigned branches. This role conducts detailed reviews of members' investment portfolios and life-cycle needs, delivering tailored recommendations and solutions.

This role serves as a resource and informal mentor to branch staff and Wealth Advisors on investment products and planning strategies.

Key Responsibilities

Business Development

- Identify wealth and financial planning needs among existing and potential members.
- Engage members in the wealth discovery process, helping them consolidate assets with Khalsa Credit Union.
- Refer members to the appropriate advisor based on the Wealth Continuum.
- Network with local business organizations and participate in community initiatives to promote Khalsa Credit Union's wealth offerings.

Sales and Service Strategy

- Provide financial planning advice on investment products and services to high-value members (typically with investible assets over $100,000).
- Utilize financial planning tools to assess member needs and recommend suitable solutions.
- Identify opportunities to consolidate external assets with Khalsa Credit Union.

Risk Management

- Act in accordance with ethical standards, Aviso policies, and applicable regulatory requirements.
- Maintain compliance with audit, risk management, and regulatory policies to minimize risk to the credit union and its members.

Leadership & Mentorship

- Build relationships with branch employees and Wealth Advisors.
- Provide guidance and informal mentoring on investment products, financial planning strategies, and referral practices.

Member Transactions & Support

- Ensure accurate completion of member account documentation and transactions where applicable.
- Maintain comprehensive member files and facilitate seamless handoff to the appropriate advisor.

Qualifications & Experience

- Bachelor's Degree in a related discipline or equivalent combination of education and experience.
- Mutual Funds License and **Certified Financial Planner (CFP)** designation required.
- Minimum **6 years of experience** in investment/financial planning advisory or sales roles.
- Familiarity with financial planning tools/software preferred (e.g., PlanPlus).
- Proven knowledge of a wide range of investment products and services.
- Strong networking, relationship-building, and sales skills.

- Excellent verbal and written communication skills.
- Ability to analyze financial statements and member portfolios.
- Proficiency with Microsoft Office and web-based financial applications.

Compensation & Benefits

This role is primarily **commission-based**, offering high earning potential in a performance-driven environment. A guaranteed base salary ensures financial stability, while the majority of compensation is tied to success in the role.

Khalsa Credit Union also offers:

- Comprehensive health and mental health coverage.
- Group RRSP matching and employee banking advantages.
- Flexible work arrangements and vacation time to support work-life balance.
- Professional development support, including internal training, LinkedIn Learning, and reimbursement for external courses.