



EMPLOYMENT OPPORTUNITY

Wealth Associate

(1) Permanent - Full-Time *Supports Churchbridge & Langenburg branches*

The Wealth Associate supports the Wealth Team by providing administrative, operational, and member service support. Working closely with Wealth Advisors, this role helps ensure member transactions, documentation, and daily activities are completed accurately and efficiently while delivering an exceptional member experience.

Reporting to the Deposit Manager, the role of the Wealth Associate will be to:

- Support Wealth Advisors with administrative and operational activities.
- Process and maintain member investment accounts and documentation.
- Assist members with wealth products, services, and inquiries.
- Coordinate meetings, follow-ups, and member communications.
- Complete reporting and maintain accurate records.
- Ensure compliance with regulatory, privacy, and organizational requirements.
- Collaborate with internal teams to support wealth initiatives and member experience.

What You'll Bring

- Post-secondary education in Business, Finance, Administration, or a related field is preferred.
- Experience in financial services, administration, or wealth management is an asset.
- Knowledge of investment products such as TFSAs, RRSPs, RRIFs, RESPs, and term deposits.
- Strong organizational, communication, and problem-solving skills.
- High level of accuracy, confidentiality, and attention to detail.
- Proficiency with Microsoft Office and business software applications.
- Demonstrated commitment to professional development.
- Willingness and ability to obtain the appropriate investment licensing requirements within an established timeframe.

What You Gain

At Churchbridge Credit Union, you'll be part of a team that makes a meaningful difference in the lives of our members and communities. We offer competitive compensation and benefits, ongoing learning and development opportunities, and a supportive workplace where you can grow your career.

Who We Are

Churchbridge Credit Union is a rural based, community focused Credit Union with 2 branches and over 35 employees serving 3,500 members. We build relationships by providing financial solutions and supporting our communities. Employee engagement is valued and there is ample opportunity for growth for career-minded individuals. Our organization has branches in Churchbridge and Langenburg, while also serving many surrounding communities.

If this opportunity aligns with your skills and career goals, we encourage you to apply.

Please submit your resume, in confidence via email or mail to:

Churchbridge Credit Union
Attn: Human Resources
Box 260 Churchbridge, SK S0A 0M0
careers@churchbridgecu.ca