



Investment Assistant
Wealth Management Department - Plessis Road Branch
Part Time – 20 hours a week

The Position:

Reporting to the Senior Investment Specialist, the Investment Assistant provides support to the Investment Specialists and assists in the administration of mutual fund accounts as well as documents relating to Casera Credit Union products and services. They will respond to member and potential member inquiries by analyzing needs, communicating product and service information clearly and concisely, with the ability to answer basic questions and refer complex questions for follow up.

The Investment Assistant will maintain proper documentation for investment accounts, review reports, contact members, prepare documentation and complete routine correspondence while ensuring all assigned activities are in compliance with legislations, regulations, policies and procedures.

The Person:

The ideal candidate has two – three years of experience in a similar role, is organized with good time management ability, has high attention to detail and effective listening skills. They are service oriented with a commitment to exceptional member service. A strong knowledge of Registered Plans and products as well as a working knowledge of other financial products and services.

The Salary:

Salary will be based on qualifications and experience and includes a comprehensive benefit package.

Please forward your cover letter and resume to Careers@caseracu.ca by 5:00pm on Friday, August 23, 2019.

Casera Credit Union would like to thank all applicants for their interest, however, only those selected for an interview will be contacted.