



Mosaik Credit Union
Limited is a co-operative,
full service, financial
institution in beautiful
Nova Scotia. We support
the growth and
development of 9 locations
in 8 communities.



**We're more than a bank. We're committed to
strengthening our communities and empowering
financial success. Through exceptional products, expert
guidance, and strong member relationships, we help
individuals, families, and businesses make confident
financial decisions.**

Mosaik Credit Union is seeking a **Financial Relationship Advisor** to join our **Truro** team!

Position Summary

Reporting to the Branch Manager, the **Financial Relationship Advisor (FRA)** delivers exceptional member service by providing personalized banking, savings, investment, and financial planning solutions. The FRA builds strong member relationships, identifies opportunities to support financial goals, and helps members make informed financial decisions

Key Responsibilities

- Identify investment, savings, and banking solutions that support members' financial goals.
- Assess financial needs and provide advice on investments, retirement planning, and everyday banking.
- Identify lending opportunities and refer members to the appropriate advisor when needed.
- Open and maintain personal, business, and registered investment accounts.
- Support members with account updates, transfers, and other account maintenance requests.
- Manage deposit and investment renewals while building long-term member relationships.
- Provide guidance on budgeting, cash management, retirement planning, and estate-related services.

- Empower members through personalized financial advice and education tailored to their goals.
- Support branch operations and assist team members in delivering exceptional member service.

Qualifications

The Financial Relationship Advisor will have successfully completed a certificate or diploma in Business Administration plus have a minimum of two to three years experience in a financial institution; or have an equivalent combination of education and experience. Also required to have obtained their Mutual Funds License.

Skills and Competencies

- Extraordinary member service ability
- Expert knowledge of credit union products and services; including, investment & deposit products, personal accounts, commercial accounts, and electronic services
- Knowledge of financial principles
- Knowledge of policies and regulatory environment
- Strong communication skills, written and oral
- Strong organizational skills and ability to multi-task
- Time management and work planning
- Attention to detail and accuracy
- Proven sales ability; generating and closing sales

Compensation and Benefits

We offer competitive compensation to commensurate with qualifications and experience. In addition, we offer an excellent benefit package including a flexible health and dental plan, employer matched defined contribution pension plan, staff banking rates, paid vacation and sick time, and professional development opportunities.

We Would Love to Hear From You

To apply for this position, please forward your cover letter and resume to
careers@mosaikcu.ca

At Mosaik, we value diversity, equity, and inclusion within our team and in the relationships we build with our employees and our members. If you do not meet all of the above criteria but feel that you would be a great fit with our team, we encourage you to apply.

Mosaik Credit Union appreciates all applications, however, only candidates who have been selected for an interview will be contacted.