



Financial Consultant

Fox Communities Credit Union is a \$1.5 billion in assets community-based credit union serving over 100,000 members at 22 locations. We take pride in being a progressive, member-owned, full service financial institution dedicated to serving the community.

In partnership with LPL Financial we are searching for a Financial Consultant for the Green Bay and Lakeshore markets. The role of the Financial Consultant is to educate our members on the alternative investment options not available to them at the credit union. The Financial Consultant will recommend the sale of alternative investments when appropriate for the member's investment planning goals.

Duties of this role will include but are not limited to:

- Interview member clients to determine their current income, expenses, insurance coverage, tax status, financial objectives, risk tolerance, and other information needed to develop a financial plan.
- Recommend strategies clients can use to achieve their financial goals and objectives, including specific recommendations in such areas as funding for a secure retirement, grand child or child's education, growth above inflation and taxes, protection of assets from unexpected health care expenses, and protection of assets from estate taxes.
- Analyze financial information obtained from clients to determine strategies for meeting client's financial objectives.
- Research and investigate available investment opportunities to determine whether they fit into financial plans.
- Monitor financial market trends to ensure that plans are effective, and to identify any necessary updates.
- Answer and support client questions about the purposes and details of financial plans and strategies; review client accounts and plans to determine whether life changes; economic changes, or financial performance indicate a need for plan reassessment. Sell financial products such as stocks, bonds, mutual funds and insurance.
- Contact clients periodically to determine if there have been changes in their financial status.
- Prospecting within the credit union by establishing relationships with member contact employees. Also refer investment client back to credit union employees. (mortgages, deposit products, and consumer loans and credit cards). Prospect outside the credit union in order to bring in new member relationships.
- Prepare and interpret client's information such as investment performance reports, financial document summaries, and income projections. Guide clients in the gathering of information such as bank account records, income tax returns, life and disability insurance records, pension or retirement plan information.

Preferred candidates for this position will possess:

- Equivalent to a college degree (BS or BA in relevant field)
- Three to five years of similar or related experience.
- Maintain FINRA series 7, 63, and 66 or 65 licenses
- Maintain WI Life Insurance license.

Fox Communities Credit Union believes our employees are our most important asset. **We offer a great team environment, competitive salary and an excellent benefit package which includes, medical, dental, vision, life, short-term and long-term disability insurance, 401k (Roth and Traditional), which includes company contributions including match, and paid time off! As part of our commitment to the communities we serve we also offer all employees Paid Volunteer Time Off!** If you are enthusiastic about a rewarding career with a successful & growing credit union, please complete an online application and/or submit your resume and salary requirements to:

Human Resources, Fox Communities Credit Union. 3401 E. Calumet Street Appleton, WI 54915.

www.foxcu.org. Email: hr@foxcu.org. Equal Opportunity Employer of Minorities, Females, Protected Veterans, and Individuals with Disabilities.

Team Fox Rocks!