



Temporary Financial Advisor (9–10 Months) Park Royal Branch Part-Time

Posted by: Beem Credit Union

Location: West Vancouver

Salary: \$\$75,000–\$85,000 Per Year

Job Details

Job ID

NCJ6438856

Posting Date : 25-Feb-2026

Expiry Date : 24-Aug-2026

Education : CFP

Language : English

Vacancies : 2

Years of Experience : 1 year

Job Type : Part Time

Job Description

Location

815 Main St, West Vancouver, BC V7T 2Z3

Complete job description

Beem Credit Union: Finance for all travels

Beem is changing the definition of a credit union. With an ambitious future vision and an 80-year cooperative tradition, we've come together to build a financial partner that provides both people-first service and digital convenience.

Our goal is quite clear: everyone should be financially well. Through individualized guidance, cutting-edge technology, and sincere human connection, we assist British Columbians in achieving their objectives.

Serving more than 200,000 members via 66 locations and managing \$18 billion in assets, we are one of the biggest credit unions in British Columbia.

Come along on the trip with us if you're driven to change the world and want to be a part of a group that values cooperation, creativity, and purpose.

Visit www.beemcreditunion.ca to find out more.

What this position entails:

By encouraging financial health across all credit, investment, insurance, and banking products, this role, which provides senior advisory services at our Park Royal branch, is in charge of cultivating valuable relationships with an established book of assigned customers. The financial advisor will work with insurance and investment experts to take advantage of their knowledge in meeting client needs and creating customized financial plans. The financial advisor works to build new relationships that improve customers' financial health and support the expansion of the company by recognizing and meeting both present and future requirements.

This is a temporary (10-month) part-time position in our BlueShore Financial business. Our Park Royal location in West Vancouver serves as the home headquarters for this financial advisor position. Although it could not be the identical position or location of the previous function, if an internal applicant is chosen, the assignment will be temporary and will guarantee that the person returns to a role at the same level.

What you'll do:

builds connections with assigned clients in a proactive manner in order to counsel current and prospective clients on how to achieve and preserve financial well-being. Finding and seizing suitable sales prospects that support company expansion and improve clients'

financial well-being via continuous client/potential client profiling.

confirms risk tolerance levels and finds possibilities via client conversations to define both short-term and long-term financial objectives.

sells and closes deals on a variety of loan, investing, wealth protection, and deposit products within the designated portfolio.

grants consumer loans, mortgages, and other loans up to the designated lending limitations for the designated portfolio. encourages the selling of credit insurance. makes suitable suggestions for credit that exceeds limitations.

offers and markets items for mutual funds.

identifies possible customer requirements and serves as a point of contact for clients and experts in advanced tax planning, asset protection, and investments.

makes proactive and efficient use of all available resources, particularly our Client Relationship Management (CEM) software, to provide customers seamless service and support Beem's expansion.

keeps up to date on all goods and services, rivals' offerings, and the state of the economy to better understand how they affect customers.

aggressively and successfully builds connections both within and outside the Credit Union to accomplish business goals by collaborating with the Advisory Associate, other team members, central support areas, and the community.

follows safety and security guidelines to safeguard the interests of the credit union and its members. operates within the parameters of deal approval. guarantees continual education to achieve superior customer service. makes ensuring the personal development plan is up to date. maximizes contributions by taking advantage of learning opportunities.

What you'll bring:

The designation of Certified Financial Planner (CFP) or pursuing an asset

Four to six years of increasing work experience in the financial services sector

License for Mutual Funds

Credit sales and proven investments

Income range: Prorated to a three-day-per-week schedule, the annual income range for this role is \$75,000 to \$85,000.

Our core principles at Beem are BOLD and always welcoming, and they guide everything we do!

Build Together: You are a cooperative team member that encourages inclusion, inspires ideas, and lives on teamwork.

Own It: You're prepared to take the lead, effect change, and produce exceptional outcomes.

Lead with Agility: You are a creative, energetic thinker who enjoys a challenge.

Curiosity-driven: You have a strong desire to discover, educate yourself, and influence the future.

Are you prepared to join?

To find out more about working with Beem Credit Union, visit our website at www.beemcreditunion.ca! Although we appreciate the attention of all applicants, only those who have been selected will be called for an interview.

At Beem Credit Union, we're dedicated to providing our staff with an accessible workplace and inclusive employment policies. All eligible applicants are encouraged to apply, and we do not discriminate on the basis of any protected characteristic under the Human Rights Code. We are dedicated to giving every applicant a fair and equal employment process. Every application is examined by a team member.

Beem Credit Union provides services to communities throughout British Columbia's many Treaty and Traditional Territories. We are devoted to decolonization, reconciliation, and the development of solid, interconnected connections. We are thankful to live and work on this land.

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