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***Welcome to FAIRWINDS Credit Union, a company that was built upon the simple philosophy of "people helping people" since 1949. Helping our members achieve financial freedom, helping our crewmembers grow lifelong careers here, helping our local community grow and thrive. You get the idea.***

***We continue to be the one of the best companies to work for, simply because we hire the best and most passionate talent. We are proud to promote employees from within and provide a positive work/life balance.***

### **Financial Advisor**

We are currently seeking an experienced Financial Advisor to join our Retirement Planning team. As the largest credit union in central Florida with over \$2.1 billion in assets and a progressive culture, FAIRWINDS provides unique employment opportunities.

The successful candidate will have at least 2 years of successful experience as a Licensed Financial Advisor and will build a solid book of business with the support of a branch referral network while collaborating with other business units to promote FAIRWINDS Credit Union. Financial Advisors demonstrate member advocacy and build member relationships by providing full-service financial planning, investment and insurance services or additional products. As a dual employee of FAIRWINDS and CUSO Financial Services (our broker-dealer), you will assist members with identifying their financial needs and objectives and will then recommend financial products that will help achieve those goals. **The territory for this position, with approximately \$250M in deposits and a \$20M book of business, includes Orange and Seminole counties.**

### **Essential Duties and Responsibilities:**

- Consults with members and prospective members with focus on analyzing goals, objectives and risk tolerance, to determine which investment products and services best meet the members' needs and then sells those products and services as appropriate
- Provides investment advice primarily on fee-based/advisory, fixed income, mutual fund, insurance and annuity investment products
- Highly organized individual with knowledge of essential systems, policy and procedures, and investment products and services, including basic financial planning and asset allocation techniques

**Required Education & Experience:**

- Bachelor's degree from four-year college or university; or one to two years of related experience and/or training; or equivalent combination of education and experience. Bachelor's Degree in Business, Finance, Insurance or related field preferred.
- Series 7 and 63, 65 or 66 licenses required
- FL Life, Health, Fixed/Variable Annuity insurance license required
- Minimum 2 years of experience in needs-based analysis and delivery of personal investment products and services

***FAIRWINDS* is proud to offer Financial Advisors a highly competitive commission structure and benefits package including:**

- Medical, Dental and Vision insurance benefits
- 401K Match
- Life Insurance
- Disability Insurance
- Health Savings Account
- Vacation and Holiday Pay
- Tuition Reimbursement

**\*\*\*Interested candidates please submit your resume to Joanne Stake – [jstake@fairwinds.org](mailto:jstake@fairwinds.org)**