



PACIFIC NW
FEDERAL CREDIT UNION



CUSO FINANCIAL
SERVICES, L.P.
MEMBER FINRA/SIPC

Join a Winning Team at Pacific NW Federal Credit Union!

Pacific NW Federal Credit Union is seeking an Investment Sales Assistant in the in Portland, OR area.

As an **Investment Sales Assistant**, you become part of the credit union environment providing support to Financial Advisors along with helping to build member relationships. The position is responsible for support and coordination of all activities related to client service, including outbound calls to clients and prospects, making appointments for the representative, processing of paperwork and coordination of business development activities, as well as for a contribution to sales if appropriately licensed.

Founded in 1942 by a handful of Bonneville Power Administration employees, **Pacific NW Federal Credit Union** has continued to grow and now has over 16,000 members. Pacific NW Federal Credit Union is a member-owned financial cooperative existing to provide high quality products and services, which enable our membership to achieve financial health and independence. *To learn more about Pacific NW Federal Credit Union, visit www.pnwfcu.org.*

Qualified candidates must have:

- A strong desire to advance
- A minimum 2 years of experience in a support, sales or administrative capacity, preferably in a financial service or sales environment
- Current FINRA Series 6 or 7, and 63 **preferred but not required**
- Insurance licenses: life, accident, and health **preferred but not required**
- Clean Background and CRD required
- Excellent organizational and communication skills
- College Degree preferred

Investment Sales Assistants are employed by CFS and registered through CFS (Member FINRA/SIPC). CUSO Financial Services, L.P. is a broker/dealer and RIA with a stable 21 year track record of serving the investment needs of some of the nation's leading credit unions and their members. We offer our Advisors a supportive back office staff, as well as fully supportive credit union staff, tomorrow's technology, a proprietary database for client information, and we clear through Pershing. To learn more about CUSO Financial Services, L.P., go to www.cusonet.com.

For immediate consideration please apply online at:

https://www.appone.com/MainInfoReq.asp?R_ID=1977441

EOE

Relevant Word Search: Registered Representative, Advisor, Adviser, Certified Financial Planner, CFP, Financial Consultant, Investment Manager, Investment services, Mutual Funds, Investments, Chartered Financial Consultant, CHFC, Sales, Banking, Broker, Financial Services, Financial Professional, Financial Advisor, Insurance Sales, Bankers, Finance, Retirement Planning, Estate Planning, 401k, Life and Casualty, Asset Management, Wealth Management