



**Position title:** **Business Relations Leader**

**Location:** Toronto, Ontario

**Status:** Permanent full time

**Reports to:** Member Relations Manager

You have waited for an opportunity like this for a long time. You are a relationship professional willing to roll up your sleeves for the day-to-day demands of serving business owners while contributing to the overall direction of the organization. At Luminus Financial, our goal is to provide our member-owners with excellent financial services at the lowest possible cost. We return profits to our member-owners in the form of bonus interest on their deposits and interest rebates on loans and mortgages. We strive to be our members' first choice for financial products, services and advice.

Leadership at Luminus is about creating a sense of direction, excitement and purpose for employees. It involves energizing individuals to strive towards a compelling vision of the future by embracing and living the Luminus values in all aspects of their work. It includes offering clarity around goals and providing the required resources and motivational support for employees to grow. If you are looking for a challenging role and want to make a difference for our member-owners, then this may be the right next challenge for you!

Luminus Financial is seeking a Business Relations Leader. Reporting to the Member Relations Manager, you will be responsible for upwards of 30 business relationships. The Business Relations Leader is the lead business banking representative at the branch assisting members-owners in their selection of various accounts and financial services; cross-selling Luminus products and services; opening, maintaining and closing of all account types; performing branch clerical duties; promoting business for the organization by maintaining good member-owner relations and referring members-owners to appropriate staff and partners for new services. The Business Relations Leader will be fully responsible for the maintenance and growth of the business banking portfolio, specifically Luminus Financial's Specialty High Risk Entity Members (SHREM) Program. This role acts as the liaison between members-owners and various credit union departments (i.e., loans, deposits, accounting) and actively

**LUMINUS FINANCIAL**

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participates in all branch campaigns and promotions and champions the organization's sales oriented culture by performing all aspects of the mandate. between member-owners and various credit union departments (i.e. loans, deposits, accounting) and actively participates in all branch campaigns and promotions and champions the organization's sales oriented culture by performing all aspects of the mandate.

### **Principle Accountabilities:**

- Act as an ambassador for Luminus both internally and externally to promote the Luminus brand
- Demonstrate a high level of professionalism at all times through attire, voice and actions
- Maintain a team environment that is open and transparent
- Act as the primary resource for Business Banking, specifically Luminus Financial's Specialty High Risk Entity Members (SHREM) Program
- Act as the primary resource for opening business accounts and effectively manages the member-owner on-boarding process
- Identify opportunities to promote, up sell, cross sell and process appropriate documents associated with the sale of savings and investment products, Business Mastercard, CAFT, business cheque orders, and other miscellaneous business account related requests.
- Responsible for auditing business account updates (i.e. signer changes, etc.) conducted at branches and serve to support branches with any business account related enquiries.
- Responsible for summarizing and recommending Enhanced Due Diligence and Annual Enhanced Due Diligence reports on each SHREM account as provided by our AML consultants.
- Participate in all branch promotions as set out in the business plan
- Participate in outbound calling programs
- Work with branch partners to ensure the culture and brand is upheld

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- Support and uphold a team based work environment that includes cross-functional support that creates a proactive atmosphere of supporting one another
- Grow the membership
- As required, represent the credit union in the community by participating in/organizing local business activities and community functions
- Focuses and strictly manages all areas of compliance, branch operating procedures, lending policies and security requirements
- Other duties as assigned

### **Minimum Qualifications:**

- BA or equivalent
- 3-5 years financial services experience
- Demonstrated ability to work within a team environment
- Proven track record of reaching/surpassing sales targets
- Demonstrated ability to identify addition member-owner needs

### **Required Competencies:**

1. **Decision Making**
  - Uses sound judgment to make good decisions based on information gathered and analyzed
  - Considers all pertinent facts and alternatives before deciding on the most appropriate action
  - Commits to decision
2. **Teamwork and Member Service**
  - Interacts with people effectively. Able and willing to share and receive information.
  - Leverage Collaborative Relationships



- Supports group decisions and focuses on branch, team and personal goals
- Looks for opportunities to help others
- Leverages opportunities to grow the business

### 3. **Reliability**

- Takes personal responsibility for job performance
- Completes work in a timely and consistent manner
- Focuses and follows through on commitments
- Clearly articulates expectations

### **How to apply:**

If you love working with people and are interested in making a real difference in the lives of our member-owners to provide “clearly better banking”, then we'd love to hear from you!

Please submit your resume and cover letter to: [careers@luminusfinancial.com](mailto:careers@luminusfinancial.com) by June 10, 2022.

*We thank all applicants for their interest in Luminus, however only those selected for an interview will be contacted.*

*If you require any form of accommodation, please be sure to advise and Luminus Financial will be glad to extend our hand to help.*

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