PenAir Credit Union
AVP Wealth Management Program Manager
Location: Pensacola, Florida
Apply Here https://shorturl.at/NkiLH
Or contact Noelle White noelle.white@penair.org

Company Description

Since 1936 PenAir® Credit Union has been the catalyst where community, resources, and impact come together and produce a powerful force for good. We have a unique culture and we're passionate about it. Grown from the values we hold most dear, three guiding principles shape how we see the people we serve, the community around us, and our role within it. These guiding principles are Respect, Service, and Communerosity® and they're woven throughout our culture.

PenAir is where people and community, resources and expertise align with your values to create real impact. Generational impact through strong financial education and support. We care about the things you care about. As the largest and oldest credit union in Pensacola, Florida, with more than $2.5 billion in assets, our purpose is to enhance the lives of those we serve in the Florida Panhandle, Southern Alabama, and Virginia.

Careers
Do you have a passion for helping others?
Currently, PenAir provides access to 14 convenient locations in Baldwin County, AL and Escambia, Santa Rosa, and Okaloosa Counties in Florida. Join us and become a powerful force for good - after all we live, work, and play here too.

Join the team. You'll fit right in.
Take control of your future by mapping out a career at PenAir. Working with us means you can shape your professional experience to suit your dreams. We offer valuable resources that provide you the opportunity to build upon and strengthen your skills. Whether it be a career path in advising our members directly on products and services, guiding them through major purchase decisions on a home or vehicle, or even helping build the technology and processes behind the scenes, there is a place for everyone at Pen Air! Success looks different for everyone. Where will your journey take you?

The PenAir difference.
Just like we strive to be a force for good at work, Pen Air works just as hard to supply

employees with a total rewards package that includes competitive salaries and meaningful benefits.

Holistic Amenities:

- Up to $15K available for continuing education
- Student Loan Paydown
- Adoption Assistance Reimbursement
- Wellness Programs
- Gym membership reimbursement
- Formal Career Development Resources
- Financial Wellness Resources
- Purchase assistance with computers and fitness equipment.

Benefits Package Highlights:

- Generous PTO Plan—20 days for new hires
- Paid Maternal & Parental Leave
- Competitive Retirement Plan
- Competitive medical, dental & vision plans
- Company paid Telehealth services.
- Company paid Short Term Disability
- And more……….!

About the role:

The Assistant Vice President, Wealth Management Program Manager, is responsible for the overall leadership, strategy, and success of the credit union's Wealth Management program. This role includes overseeing financial advisors, driving program growth, enhancing member engagement, and ensuring compliance with all regulatory and broker-dealer requirements.
The AVP is expected to develop and execute strategies that expand the program's market reach, increase program efficiency, and improve member access to financial planning and investment services. This leader will cultivate a high-performing advisory team, develop referral partnerships, and align the program with the credit union's broader financial services strategy.

Major Duties and Responsibilities:

- Program Leadership & Business Growth: Develop and execute strategies to grow the Wealth Management program. Identify and implement initiatives to expand financial services offerings and enhance member engagement. Build relationships with internal teams to increase awareness and accessibility of wealth management services. Ensure the program operates efficiently and contributes to the credit union's overall success.

- Advisor Management & Development: Oversee a team of financial advisors, ensuring strong sales performance and adherence to service standards. Recruit, train, and mentor advisors, fostering a high-performance culture. Set and monitor performance benchmarks, providing ongoing coaching and professional development. Implement training programs and business development strategies to improve advisor effectiveness.
- Member Experience & Business Development: Strengthen referral partnerships within the credit union to drive new business. Develop and participate in marketing and outreach initiatives to increase member awareness of wealth management services. Ensure a member-first approach, emphasizing financial education, personalized service, and fiduciary responsibility.
- Compliance & Operational Oversight: Ensure adherence to FINRA, SEC, and state regulations, as well as broker-dealer compliance requirements. Implement strong supervisory procedures to mitigate risk and maintain regulatory integrity. Oversee reporting, program audits, and operational processes to ensure compliance and efficiency. Work with compliance teams to ensure program alignment with industry best practices.
- Performs other job-related duties as assigned.

Minimum Qualifications:

- **Experience:** Minimum of 7-10 years of experience in wealth management, investment services, or financial advising, with at least 3 years in a leadership or program management role. Strong leadership and business development experience within a financial institution or broker-dealer setting.
- **Education/Certifications/Licenses**: A Bachelor's or Graduate degree in Business, Finance, or a related field is required, along with a valid Series 7 license. If registered after October 1, 2018, candidates must also possess a valid and active Securities Industry Essentials (SIE) exam certification. A valid and active Series 66 (or Series 63/65) and a Life and Health Insurance license must be obtained within 60 days of starting the role as a condition of employment. Certified Financial Planner (CFP) preferred but not required. Must maintain all licenses and meet ongoing continuing education requirements.
- **Interpersonal Skills:** Demonstrated strong leadership and coaching abilities, with proven experience in managing a team of advisors. Exceptional communication and relationship-building skills, effectively engaging with both internal teams and

external partners. The Assistant Vice President (AVP) must exhibit executive presence and the ability to collaborate closely with senior leadership to align the Wealth Management program with the credit union’s strategic objectives.

- **Other Skills:** Comprehensive knowledge of investment products, financial planning, compliance requirements, finance, and economics is essential. Strong qualitative and quantitative analytical skills are required, with the ability to conduct thorough investment analysis. Proficiency in PC software, including word processing, database management, and spreadsheets, as well as knowledge of security interest computations, is necessary. Must be capable of operating various types of office equipment, such as computers, calculators/ten-key devices, copy machines, and telephones. This role requires travel to branch locations and potential market expansion areas. Active participation in industry events, continuing education, and professional development is expected.

This Job Description is not a complete statement of all duties and responsibilities comprising the position.