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OPPORTUNITY PROFILE

President & CEO



About connectFirst Credit Union

www.connectfirstcu.com

As a credit union, we're different than a bank - and we like it that way.

At Connect First, we spend our days helping our members achieve their financial aspirations through a community-focused approach to banking that's true to our co-operative principles. You're our member, not a number. We're your neighbours and your partner. Over 80 years ago we started from humble beginnings. Through the years, we've grown to become one of Alberta's leading financial institutions through a desire to connect the dots between your dreams, your goals, your community, and your financial wellness and we echo these desires through our new, consolidated connectFirst brand.

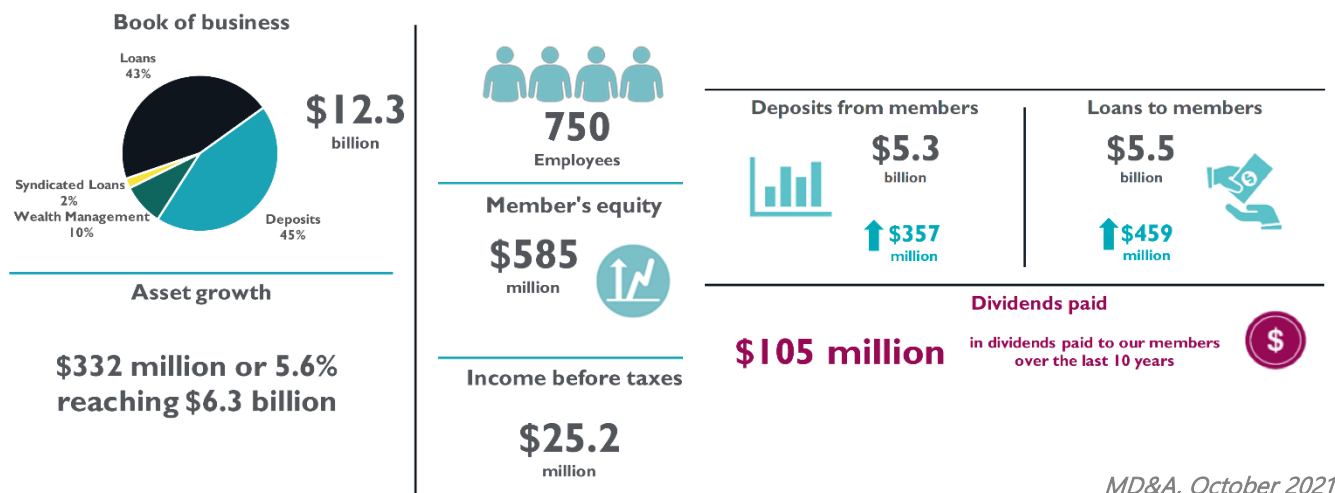


We believe that banking is about more than money – it's a cornerstone of every vibrant community and that our members should expect us to positively impact the financial success and viability of the communities that we call home. We invest meaningfully in the potential and well-being of our employees, and what matters most to our members. We have honest conversations about real things, as real people. Our members are owners, they have a say in how we operate, they earn dividends on common shares and investment shares, and they have access to an extensive array of financial products and services.

- Our mission Make money make a difference.
- Our vision Do what's right for every member.
- Our values Think big, act local, take charge, and make it easy.

We're committed to providing remarkable experiences to our members, our communities, and our employees, and we're proud to be regarded as one of the best:

- Named among Canada's Most Admired Corporate Cultures™ by Waterstone Human Capital
- Recipient of Canada's Best Managed Companies award for 21 consecutive years



Banks see numbers. We see Albertans.



The Opportunity

Is this where YOU belong? This is an exciting role for a strategic CEO with the ability to motivate high performing leaders and teams, drive progressive change, and promote a sense of belonging across the organization. You clearly model the highest ethical standards and an unwavering commitment to diversity, equity, inclusion and incorporate ESG principles into decision-making processes. You lead by example, and can win the hearts and minds of all employees as you build excitement, support innovation, and bring the strategic plan to life. You set the tone for a culture that thrives on collaboration and deep-rooted organizational values. And above all, doing the right thing for every member and delivering exceptional member experience.

The CEO is accountable to the Board of Directors for the successful financial and values-driven performance of connectFirst Credit Union. They are responsible for providing dynamic and effective strategic leadership and direction to all aspects of connectFirst operations and within the credit union system where, as one of Canada's 10 largest credit unions, connectFirst plays an important part. The CEO is accountable for the ongoing growth and sustainability of the organization through both traditional and non-interest lines of business as well as the execution of connectFirst's current strategic direction centered on exceptional member experience.

With a new Strategic Direction in 2019, connectFirst began an aggressive two-year transformation journey setting the stage for continued and sustained growth in the years ahead. In pursuit of a vision To Do What's Right for Every Member, the Strategic Direction outlines three key pillars to guide connectFirst in the coming years to build a credit union fit for the 21st century: DIFFERENTIATE, EXPAND, and TRANSFORM.

Continuing a focus on profitable growth, connectFirst is committed to delivering a remarkable member experience, one that takes time to connect with members, understand their needs, and feel pride in the role that the credit union plays in creating a more prosperous Alberta.



DIFFERENTIATE

Grow today by building a differentiated member experience



EXPAND

Invest in targeted growth opportunities to accelerate today's growth



TRANSFORM

Innovate in preparation for tomorrow's disruptive business models

Key Accountabilities

Strategy and Planning:

- Effectively lead long-term strategy evolution and short-term business planning, budgeting, and key strategic initiatives.
- Ensure connectFirst Credit Union's continued relevance to its members - both rural and urban - as well as its ongoing financial viability.
- Demonstrate a deep understanding of the impact and value of new technologies, investing appropriately in those that enable the business and the optimization of exceptional member service across all channels.
- Solid understanding of the strategic role of digital service delivery evolution within the banking sector is a must, including AI utilization and other front-end customer-facing technology innovations. Also essential is an understanding of how to leverage data and analytics to drive exceptional customer experiences across all product and service lines.

Operations & Execution:

- Work collaboratively with the Senior Management Team and other leaders.
- Assess competitive industry activities and interpret emerging market trends to anticipate new opportunities and mitigate risks and threats to the credit union, effectively manage risk within risk appetite and risk tolerance limits, aligned with the long-term sustainability of the organization.
- Effectively allocate resources/capital in order to optimize success now and in the future.
- Create exceptional employee team spirit and unity along with exceptional member experience.

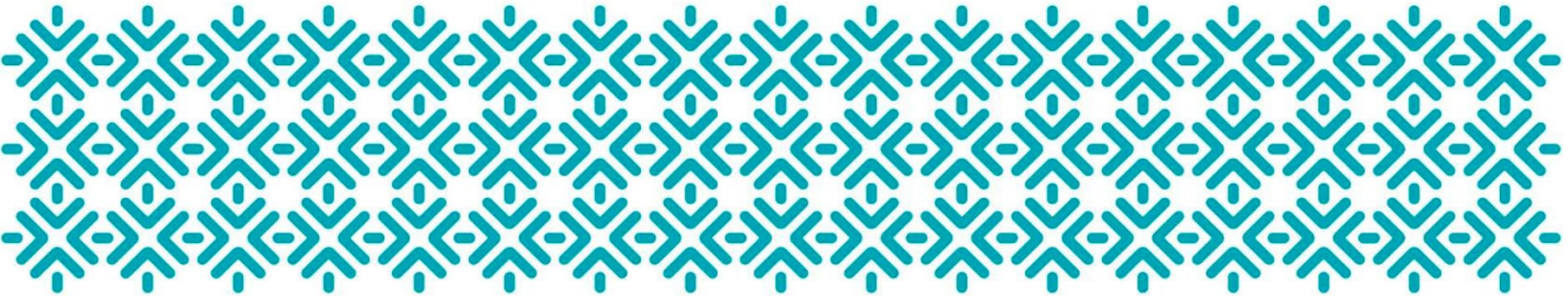
Board Relations:

- Meets regularly with the Board of Directors to engage in strategic discussion, undertake long-term planning, provoke thoughtful discussions, review issues and report on information as appropriate.
- Has a good understanding of board governance best practices and a proven ability to work effectively with a Board by fostering a relationship based on transparency and mutual respect.
- Acts in compliance with all policies as set out by the Board of Directors.

External Relationships:

- Plays a strong leadership role within the credit union system, through appointed roles and informal systems leadership.
- Is responsible for ensuring effective key supplier relationship cultivation including with credit union sector-owned and other core technology providers.
- Creates strategic alliances and effectively leads key partnerships to support profitable growth and position connectFirst as an innovative leader.
- Maintains a positive public profile as connectFirst's leader and as a local community contributor by modelling credit union values in their behavior and approach to leadership.





Experience &/or Education Requirements

- Possesses an MBA or equivalent credentials in a related relevant field.
- Offers at least 10 years of executive leadership experience with demonstrated success in delivering profitable growth and innovation within a competitive marketplace servicing a combined rural and urban customer base.
- Strong financial acumen and up-to-date understanding of North American banking and finance competitive developments and trends.
- Operational experience across some, or all, of the following: retail, commercial, agricultural and small business banking; wealth, non-interest lines of business (insurance, credit cards, etc.), capital management/planning, asset/liability management, liquidity, financial reporting and audit.
- Track record of building synergistic partnerships and alliances to drive profitable growth
- Sound understanding of risk management as it pertains to a banking organization.
- Merger evaluation and post-merger integration experience is an asset.

COMPETENCIES

Builds Trusting Relationships
Thinks Strategically; Applies Strategic Agility
Inspires People and Teams
Enables Innovative Change
Drives Business Results

CHARACTERISTICS

Integrity and Trust
Professional Excellence
Enables Leadership
Collaboration
Personal Accountability

Compensation

A competitive and attractive executive compensation package will be provided including base salary, incentive pay and excellent benefits. Relocation will be provided if required by the successful candidate. Further details will be discussed in a personal interview.

Express Your Enthusiasm

As a firm, we embrace equity, diversity and inclusion best practices, and value diversity in all forms including expertise, talent and opinion. In recruiting for our clients, we welcome the unique contributions that diverse candidates can bring. Email a cover letter and tailored resume indicating the job title in the subject line of the email to [Shalini Bhatty](mailto:Shalini.Bhatty) or [Allan Nelson](mailto:Allan.Nelson) at Calgary@leadersinternational.com.