Retirement and Pension Advisor

Company Description:
Pioneered in 1939, the Co-operative Superannuation Society (CSS) Pension Plan, located in Saskatoon, is one of the oldest and largest defined contribution pension plans in Canada. With approximately $5 billion in assets, CSS Pension Plan has grown to serve over 300 employers and 51,300 current and past co-operative and credit union employees across Canada, including more than 8,200 retirees. We are committed to diversity and inclusion, and a culture that includes compassion, mentorship, learning and development.

Summary:
We are hiring a Retirement and Pension Advisor!

Join the CSS Pension Plan and its Member Experience Department as a Retirement and Pension Advisor. In this challenging role, you will support our employer and employee members' journey by:
- Connecting with our pension plan members, of all ages, to discover their needs and assist them in making informed pension and retirement decisions,
- Taking a proactive approach to building and nurturing strong, long-standing relationships with our current and future participating employers, of all sizes, to assist in serving their employees and help with communicating the value of the CSS Pension Plan, and
- Providing mentorship and guidance to our own employees of the MX Department and CSS.

Our Retirement and Pension Advisors provide services to both our employee and our employer members. Alongside your exceptional work with our employee members, you will be championing and growing our employer experience program.

The successful candidate will be a motivated and conscientious high performer who thrives in a busy environment, has a forward-thinking strategic mindset, can pivot between competing priorities and complex matters, and has a drive to build strong member relationships. You will bring a strong passion for delivering exceptional member experiences and an understanding of the value of the co-operative system and values.

You will work effectively in a team environment guided by the team-developed "Pillars of Collaboration" which represents the values of "Respect, Commitment and Communications".

Key Responsibilities

Deliver Exceptional Member Experiences through the Provision of Pension and Retirement Expertise
- Assists members using retirement planning tools and information provided by CSS and in navigating their pension plan decisions and questions (e.g., investments, additional voluntary contributions, and their journey to and through retirement).
- Develops, delivers, and contributes to employee and employer member education and engagement programs and services (e.g., workshops, seminars, courses, articles, videos, social media content).

- Meets with members (virtually or in-person) on an individual basis to discuss pension and retirement decisions, review retirement income illustrations, prepare and review retirement plans, and assist with making application for retirement income from the CSS Pension Plan.
- Supports CSS colleagues by providing leadership, mentorship and expertise and sharing this knowledge and skillsets with others on the team.
- Establishes a positive mutual relationship between themselves, our other pension and retirement professionals and specialists and our membership.
- Proactively contacts members (employer and employee) to inform them of their options and CSS services.

Other responsibilities
- Conducts research and maintains a current understanding of pension and retirement industry and legislative matters, to effectively support the member experience.
- Assists with and leads projects (e.g., IT testing, information technology, member experience, member education and member engagement).
- Generates and analyzes reports and information from our information systems and identifies opportunities to support and enhance the member experience.
- Develops, maintains knowledge, and assists with leading the application of:
    o CSS organizational and administrative policies and procedures, and
    o CSS' vision, mission, values, and strategic direction.
- Develops and maintains an expert understanding and application of CSS Pension Plan provisions, policies, and procedures.
- Travel may be required.

Skills and Abilities

- Expert knowledge of pension, retirement, and wealth industry and legislation.
- Excellent member service, communication, relationship-building, and problem-solving skills.
- Presentation and public speaking skills.
- Excellent computer skills with proficiency using Microsoft Office (e.g., Word, Excel, PowerPoint), information technology and systems, pension databases and workflow systems, as well as the ability to generate and analyze reports and information (e.g., financial and membership).
- Must be flexible and able to manage high work volume and conflicting priorities to meet deadlines.
- Self-directed, but recognizes the importance of relationship building within the team and across the organization.
- Strong understanding and belief in the values of the co-operative system.

Qualifications

- Previous experience working with businesses and organizations to develop and deliver employee programs (e.g., pension, benefits, wellness),
- A post-secondary degree in business administration, commence or human resources,
- CERTIFIED FINANCIAL PLANNER® designation, and
- Five or more years of experience in a financial planning, wealth or retirement services or relevant role.

A combination of equivalent education, training and experience may be considered. A Pension Plan Administration Certificate (PPAC) and/or the Certified Employee Benefit Specialist (CEBS) designation is an asset.

To Apply:

Please forward your resume and cover letter (including your salary expectations) to:

CSS Pension Plan
Attn: Director, Member Experience
Email: hr@csspen.com

Competition closes: December 6, 2021
(The position may be filled sooner)

We offer a fun, challenging and inclusive work environment, along with a competitive salary and benefits package.

We thank all applicants for their interest. However, only those applicants selected for an interview will be contacted.