Client Service Advisor

(Ontario Pension Board - https://www.opb.ca)

At OPB, the health, safety and wellness of our employees, clients, vendors, and stakeholders is our top priority. In accordance with the advice of applicable public health authorities, we have transitioned to work-from-home to mitigate the risk of the potential spread of COVID-19. To learn more about our hiring protocols during the COVID-19 pandemic, please visit our Careers site at **https://www.opb.ca/about-opb/careers**.

Are you a Certified Financial Planner with an absolute passion for delivering exceptional client service and retirement planning solutions?
Take the next in step your career with Ontario Pension Board (OPB) as a Client Service Advisor!

As a Client Service Advisor, you will deliver a range of advisory services as you build and manage trusted relationships with members, pensioners and stakeholders, as well as provide financial expertise and leadership support to colleagues in support of Client Services team goals and objectives. Your ongoing commitment to service excellence will be realized through the provision of proactive and personalized consultative support, guidance, and expert advice to clients as they exercise their options and entitlements under the Public Service Pension Plan (PSPP). Conducting a full analysis of a client's circumstances, history, current financial information, future needs, and Plan provisions, you will recommend client-centric solutions, identifying financial implications and possible risks with each option. You will manage escalated client requests to identify potential issues, trends, risks and opportunities, as well as recommend and implement solutions to continually enhance overall service delivery. You will also participate in client meetings, workshops and presentations (in-house and off-site) by providing expertise and advice on emerging issues, pension legislation reform, and industry changes. Occasional travel across Ontario is required for this position, as feasible.

Key Qualifications:

A Certified Financial Planner designation in addition to previous financial experience, complemented by your strong knowledge of retirement planning concepts, pension plans, preferably defined benefit, as well as retirement savings and estate planning concepts and products. Your extensive experience in providing client service is complemented by your strong relationship management and interpersonal skills, enthusiasm for client contact, and the ability to build and maintain trusted relationships. Demonstrated organizational and time management skills allow you to be proactive, and to plan, monitor work, contribute to the achievement of team goals and meet client commitments. You have excellent communication skills, both written and oral, with the ability to explain technical information to a wide variety of clients and to adjust your communication style as required. You are able to effectively resolve difficult situations with tact and diplomacy and have effective analytical skills to interpret and identify trends, issues, and emerging client requirements. You have a strong desire to continually learn and you embrace a culture of teamwork, collaboration and development.

If consistently delivering service excellence ignites your passion, submit your resume to be considered for this exciting opportunity.

Please visit OPB's Career page to apply: https://opb.talcura.com/candidates/home.aspx

The competition will remain open until a successful candidate is selected or until the competition is closed.

OPB is committed to providing accommodation for people with disabilities in its recruitment process. Please advise OPB if you require an accommodation and we will work with you to meet your needs. Candidates being considered for this position will be required to submit to a background screening. We thank all applicants for their interest, however, only candidates selected for an interview will be contacted.