Client Service Advisor

Are you a Certified Financial Planner with an absolute passion for delivering exceptional client service and retirement planning solutions?
Consider joining Ontario Pension Board (OPB) as a Client Service Advisor!

At OPB, the health and safety 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**.

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 leadership support to colleagues on the Client Services team. 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.
Are you interested in this exciting opportunity?

Please submit your resume if you are interested in this exciting opportunity.

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

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

We thank all applicants, however, only those selected for an interview will be contacted.
This competition is open to all employees of OPB and has been advertised on LinkedIn.
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