

Client Service Advisor (Certified Financial Planner – CFP®)
Advisory Services - Client Services
Permanent Full-time

About us:

The Ontario Pension Board (OPB) administers the Public Service Pension Plan (the PSPP), a major defined benefit pension plan sponsored by the Government of Ontario. With 100,000 members and \$36 billion in assets, the PSPP is one of Canada's largest pension plans. It is also one of the country's oldest, successfully delivering the pension promise since the early 1920s. [Learn more about OPB.](#)

About the role:

Are you a Certified Financial Planner (CFP®) with an absolute passion for delivering exceptional client service and retirement planning solutions? The Ontario Pension Board has an excellent opportunity for a CFP professional with enthusiasm for client engagement and advancing financial literacy. As a Client Service Advisor, you will deliver a range of advisory services and empower clients in making informed financial decisions as they navigate options related to their pension and plan for retirement. Reporting to the Manager, Client Services, the Client Service Advisor delivers subject matter expertise across OPB and champions the advancement of broader Client Services goals, initiatives and objectives.

Key Responsibilities:

- Leading client meetings through delivering personalized consultation, unbiased 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, to recommend client-centric solutions, identifying financial implications and possible risks with each option.
- Managing escalated client requests to identify potential issues, trends, risks and opportunities, as well as recommend and implement solutions to continually enhance overall service delivery.
- Contributing financial expertise on various initiatives, including the development of tools, resources, processes, and technologies to continually enhance client experiences and advisory services.
- Participating in 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:

- **Holding the Certified Financial Planner (CFP®) designation in good standing is a job requirement.**
- Experience developing customized financial plans with an excellent understanding of retirement planning along with comprehensive knowledge of financial planning concepts including pension plans (preferably defined benefit), estate planning, taxation and other products.
- Superior relationship management and interpersonal skills to effectively engage with clients, identify their needs and deepen trust while providing customized and consultative support.
- Excellent written and verbal communication skills with the ability to explain technical information to a wide variety of clients and effectively resolve difficult situations with tact and diplomacy.

- Demonstrated organizational and time management skills and proactivity to support effective planning and delivery on client commitments, while balancing sustained progress towards the achievement of broader team and strategic goals.
- Well-developed analytical skills to interpret and identify trends, issues, and emerging client requirements and effectively identify and mitigate risk.
- Strong desire to continually learn and contribute to a culture of teamwork, collaboration and development.

Compensation:

- The target hiring salary for this position is \$95,000. A candidate's placement in the range is based on skills, knowledge, experience, and internal equity, with consideration for how the candidate is developing, meets, or exceeds the role's requirements.
- This position is eligible to participate in OPB's Annual Incentive Program, subject to its terms and conditions.

Additional Information:

- This posting is for an existing vacancy.
- The competition will remain open until a successful candidate is selected or until the competition is closed.
- No artificial intelligence tools are used to screen, assess, or select applicants for this position. We thank all applicants, however, only those selected for an interview will be contacted.
- The identified final candidate will be required to complete a background screening.
- 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. OPB is committed to fostering a culture of diversity, equity and inclusiveness that reflects the diverse communities we serve. We welcome and encourage applications from those who may contribute to the further diversification of ideas.

If you are looking for an exciting opportunity and to build a career in an innovative and dynamic organization, submit your resume by clicking on Apply Now below.

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