



Position Description

Title: Member Services Analyst
Department: Member Services
Immediate supervisor: Manager Member Services

CORE ACCOUNTABILITY:

The Member Services Analyst provides accurate and timely responses to questions and must also be able to understand the why behind the answer. Over time (18-24 months), a Member Services Analyst is expected to have a solid understanding of the provisions within the plans that they are responsible for and should also understand:

- Concepts such as termination value, adjusted termination value, open group funded ratio, small pension, integration, etc. and be able to explain these concepts to plan members.
- The role of the *Pension Benefits Act* and the *Income Tax Act*;
- Basic concepts within a Funding Policy; and
- Basic concepts within an actuarial valuation.

A Member Service Analyst must continue to learn and increase their understanding of the pension and employee benefits business.

MAJOR RESPONSIBILITIES:

1. Providing quality customer service to the organization's clients.
2. Respond to employee and employer questions (telephone or email) with respect to the pension and employee benefit programs administered by the organization.
3. Researching member files; reviewing plan documents, policies, etc.
4. Seeking required information from other team members.
5. Providing face to face counseling services to plan members.
6. Providing on site employee presentations as required.

COMPETENCY PROFILE:

1. University degree OR 2 year's post-secondary education and at least 5 years of experience in a related field.
2. Knowledge of pension plans and benefit programs administered by the organization.
3. Strong communication and presentation skills.
4. Experience and knowledge of pension plans.
5. Experience in customer service.
6. Ability to work proactively as part of a team or independently to achieve desired results.
7. Willingness to travel frequently throughout the province.
8. Written and spoken competence in English and French is required.