

## POSITION DESCRIPTION

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<b>Title:</b>	<b>Senior Member Services Analyst</b>
<b>Department:</b>	<b>Member Services</b>
<b>Immediate supervisor:</b>	<b>Manager Member Services</b>

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### CORE ACCOUNTABILITY

The Senior Member Services Analyst provides accurate and timely responses to questions and must also be able to grasp the reasoning behind each response. The Senior 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, 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.
- Basic concepts within an actuarial valuation.

The Senior Member Services Analyst must continue to learn and increase their understanding of the pension and employee benefits business.

### MAJOR RESPONSIBILITIES

- Provide quality customer service to the organization's clients
- Respond to employee and employer questions (received via telephone or email) with respect to the pension and employee benefit programs administered by the organization
- Research member files and review plan documents and policies, etc.
- Seek required information from other team members (e.g., Benefits Administration, Data Services)
- Seek interpretations on complex matters from the Manager of Client Services
- Provide face-to-face counseling services to plan members
- Provide on-site employee presentations as required
- Provide ongoing guidance and coaching to the Member Services Analysts when complex issues arise

### COMPETENCY PROFILE

- Post-secondary degree or diploma and five years' experience in a related field
- Pension Plan Administration Certificate (PPAC) would be an asset
- Knowledge of pension plans and benefit programs administered by the organization
- Strong communication and presentation skills
- Experience with and knowledge of pension plans
- Experience in customer service
- Ability to work proactively as part of a team or independently to achieve desired results
- Willingness to travel frequently throughout the province
- Written and spoken proficiency in English is required
- Written and spoken proficiency in French is considered an asset