

RETIREMENT AND PENSION ADVISOR

Grow with Us at CSS Pension Plan

Founded in 1939 and headquartered in Saskatoon, Saskatchewan, the Co-operative Superannuation Society (CSS) administers one of Canada's oldest and largest defined contribution pension plans. With \$5 billion in assets, CSS serves 300+ employers and 57,000+ members - including 9,000 retirees (receiving lifetime and/or flexible pensions) across the co-operative and credit union sectors nationwide. CSS also proudly administers a defined benefit pension plan.

We're proud to be a member-first, values-driven, and digitally evolving organization. Our national reach is matched by our local care, and our commitment to innovation is grounded in decades of trusted service.

Your Opportunity

We're seeking a passionate and purpose-driven individual to join our growing team. Whether you're an experienced professional or an emerging talent, CSS offers a place to build your career, make an impact, and grow with us.

Join the CSS Pension Plan and its Member Experience Department as a Retirement and Pension Advisor. In this challenging role, you will support our employer and employee members' journey by:

- Connecting with our pension plan members of all ages to discover their needs and assist them in making informed pension and retirement decisions,
- Taking a proactive approach to building and nurturing strong, long-standing relationships with our current and future participating employers, of all sizes, to assist in serving their employees and help with communicating the value of the CSS Pension Plan, and
- Providing mentorship and guidance to our employees of the MX Department and CSS.

Our advisory team provides services to both our employee and employer members. Alongside your exceptional work with our employee members, you will play a key role in supporting our employer services programs.

The successful candidate will be a motivated and conscientious high performer who thrives in a busy environment, has a forward-thinking strategic mindset, can pivot between competing priorities and complex matters, and has a drive to build strong member relationships. You will bring a strong passion for delivering exceptional member experiences and an understanding of the value of the co-operative system and values.

What You'll Do

Join the Member Experience Department and help shape the future of pension and retirement services in Canada. Your responsibilities will include:

- Leading member meetings (virtual and in-person) through delivering personalized consultation, unbiased guidance and expert pension and retirement income planning advice
- Supporting members as they utilize retirement income planning and pension information tools and providing analysis and discussion related to the member's unique circumstances, history, current financial information, future needs, and applicable pension provisions
- Managing escalated member inquiries to identify potential risks, issues, trends, and opportunities, as well as recommend and implement solutions to enhance overall member experience delivery continually
- Contributing financial and pension expertise on various initiatives, including the development and maintenance of tools, resources, processes, policies, and technologies to continually enhance member experiences and advisory services; providing expertise and advice on emerging issues, pension legislation, and industry changes
- Developing, implementing and enhancing educational content (articles, videos, research), presentations, workshops (webinar, in-person, recorded, in-house and off-site)
- Providing similar support and service (as described above, but modified for the audience) to prospective and current employer members
- Occasional travel across Canada may be required for this position
- Embody our "Peaks of Collaboration" - Respect, Commitment, and Communication - in everything you do.

What You Bring

In addition to valuing curiosity, collaboration, and confidence, and holding a Certified Financial Planner® professional designation in good standing, you will bring:

- Five or more years of experience in financial planning, wealth or retirement services or a relevant role
- A university degree in business administration, commerce, or human resources
- Experience developing customized financial plans with an excellent understanding of retirement planning, along with comprehensive knowledge of financial planning concepts, including pension plans (defined contribution, defined benefit, and hybrid/combination), estate planning, taxation and other wealth management topics
- Superior relationship management and interpersonal skills to effectively engage with members, 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 members and stakeholders and effectively resolve difficult situations with tact, diplomacy, and simplicity
- Demonstrated organizational and time management skills and productivity to support effective planning and delivery on member commitments, while balancing sustained progress towards the achievement of broader team and organizational goals

- Well-developed analytical skills to interpret and identify trends, issues, and emerging member requirements and effectively identify and mitigate risk
- Excellent information technology skills with proficiency using Microsoft Office tools, member information databases, workflow systems, and the ability to generate and analyze reports and information
- Strong understanding and belief in the value of the co-operative system
- Strong desire to continually learn and contribute to a culture of collaboration, teamwork and development

A combination of equivalent education, training and experience may be considered.

Why CSS?

We offer:

- A collaborative, diverse, and inclusive workplace culture
- A competitive salary and variable compensation program
- A comprehensive benefits package
- Participation in the CSS Pension Plan
- Flexible work-life balance options
- Paid flex time and volunteer time
- Opportunities for professional development and career growth
- A chance to make a real difference in the lives of those we serve

Note: This position will be an on-site position, working in and based out of our office in Saskatoon, SK.

How to Apply:

Send your resume and cover letter (including salary expectations) to:

CSS Pension Plan
Attn: Director, Member Experience
Email: hr@csspension.com

Competition closes: September 30, 2025
(The position may be filled sooner)

Applicant information is collected and maintained pursuant to CSS' Privacy Policy (please see the website for more details). Background checks will be completed on successful candidates.

We thank all applicants for their interest. However, only those applicants selected for an interview will be contacted.