



## JOB DESCRIPTION

**Job title:** Pension Specialist – Member Services

**Department:** Pension Services

**Reports to:** Team Lead, Member Services

Full-time  
 Part-time

**PURPOSE:** Give a brief description of why the job exists and how it adds value to ATRF.

Reporting to the Team Lead, Member Services, this position plays a key role in the organization, responsible for a range of tasks including verifying eligibility, calculating and confirming benefits, and adjusting, suspending or terminating pensions. Additionally, the Pension Specialist is accountable for updating active and retired member information including beneficiary and bank changes, communicating with members or their representatives, and analyzing and reconciling employer data as it relates to the payment of benefits.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:** Give a brief description to state overall purpose, expectations and/or objectives of the position. Then add bullet points, listing the specific tasks and job duties of the position that are required on a daily basis. Items should begin with action words such as perform, responsible for, deliver, develop, etc.

### Benefit Delivery

- Verify eligibility and ensure all necessary documentation and information is on file for member and retired member benefit calculations.
- Review, verify and enter information reported by employers to calculate benefits.
- Calculate and prepare member communication packages for benefit calculations including terminations, retirements, purchases, transfers with reciprocal authorities, and death benefits.
- Conduct the final verification on outgoing benefit payments.
- Communicate with reciprocal authorities, employers, disability insurance carriers, and Canada Revenue Agency as required.
- Maintain member, retired member, and beneficiary information relevant to the payment of benefits.
- Calculate and pay benefits in accordance with ATRF's governing legislation and the tax rules.

### Customer Service

- Maintain contact with plan members regarding the status of their applications and addresses underlying customer/stakeholder needs.
- Provide information to members, retired members, individuals entitled to a benefit, and individuals acting on behalf of those entitled to a benefit on the telephone, in writing, and in person to help them make informed decisions about their ATRF benefits.
- Maintain contact with reciprocal authorities and financial advisors as required.
- Coordinate with the Counsellors as required.
- Process any recalculations of benefits.

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- Contact members to inform them of general or specific issues affecting their benefit or status.

#### **Data Analysis & Reconciliation**

- Credit, adjust, and verify accrual of pensionable service for disabled members when a benefit application is in progress.
- Research, review and adjust plan members' service, salary, contribution, and interest records as required.
- Collaborate with Data and Employer Services team as required.

#### **Change Management Procedural Documentation**

- Assist in the drafting, revision and maintenance of procedural documentation for review and approval by the Team Lead, Member Services or Director – Client Excellence, Pension Services.
- Participate and identify continuous improvement opportunities for system changes and enhancements, communication materials, and documentation and procedural issues, prepare problem reports and provide solutions to senior team members (Team Lead, Member Services and/or Director – Client Excellence, Pension Services) for review/approval.

#### **Other Duties**

- Provide reception coverage as needed.
- Assisting at Teachers' Convention.
- Ad hoc/other duties as required.

**EDUCATION AND WORK EXPERIENCE QUALIFICATIONS:** This section is used to describe what knowledge, skills and abilities are required to perform the daily tasks and job duties bulleted above. For education requirements indicate type of degree or diploma required, certifications and/or designations.

- Diploma in business or benefits, plus at least two years of experience in pension administration or closely related field (i.e. banking industry).
- Certified Employee Benefit Specialist (CEBS) or Pension Plan Administration Certificate (PPAC) designation or equivalent would be an asset.
- Demonstrated interest in working directly with members and employers in a professional and highly regulated industry.
- Self-motivated with strong organizational skills, attention to detail, and the ability to multitask.
- Ability to work efficiently and effectively in a team environment with minimal supervision.
- Strong customer service orientation, along with excellent verbal and written communication skills. Bilingual in both French and English is considered an asset.
- Strong analytical and problem-solving skills along with a strong mathematical aptitude
- The ability to identify inefficiencies with processes and recommend improvements.

**INDEPENDENCE OF ACTION/AUTHORITIES:** Describe the extent to which decisions and recommendations are made independently. (e.g., complexity of problem solving).

Responsibilities are supervised occasionally with freedom of action restricted to modifications of procedural guidelines. Unusual problems are referred to a Senior Pension Specialist or the Team Lead, Member Services for resolution. The employee takes independent action as directed by general instructions, established methods, and/or clearly defined precedents or technical infrastructure. Work involves performance of specialist or technical tasks and judgement is required to effectively plan the work, set priorities and make decisions. Recommendations for improvement are taken to the Director – Client Excellence, Pension Services prior to implementation.

**LEADERSHIP, MANAGEMENT, SUPERVISORY & TEAM RESPONSIBILITY:** Describe the extent of responsibilities.

This position has no supervisory responsibilities but participates in peer-reviewing the work of one or more employees doing related work. Planning is required for some aspects of the position, but deadlines and priorities are set by the Team Lead, Member Services or Director – Client Excellence, Pension Services. In addition to training and peer reviewing, is consulted as a resource in the technical function. Significant interaction and support of team members, ATRF staff, employers, and other external stakeholders is necessary and a significant aspect of this role. Work is reviewed for accuracy, timeliness, and adherence to policies and procedures by team members, the Team Lead, and/or Director – Client Excellence, Pension Services.

**Signature**

The electronic signature below indicates that the supervisor and Human Resources have read, discussed and agreed that the information accurately reflects the work assigned.

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Name

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Signature

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Date