# Pension Fund Analyst, Reporting & Analytics

JDIMICONSULTING

**MISSISSAUGA, ON |** REPORTING TO: Director, Operations

## POSITION OVERVIEW:

JDIMI Consulting, a Navacord Company, is a multidisciplinary, professional services corporation, offering the highest standard of service in industry-leading Insurance, Financial Management and Planning & Solutions Strategies to corporations, corporate executives, business owners and individuals alike with unparalleled personalized care and service.

JDIMI Consulting, is hiring a Pension Fund Analyst, Reporting & Analytics for our Mississauga location on our retirement team. If you are a positive and results-driven individual who excels at providing superior client service and support we invite you to join our team. You will have a proven track record of providing technical expertise regarding Group Retirement plans.

## RESPONSIBILITIES:

- Understand the complexities of the group retirement service level offering.
- Handle all aspects of retirement governance reviews, including analyzing the record keeper's data and investment manager performance.
- Handle all aspects of reporting including preparation of specifications, responding to the RFP inquiries, summarizing and comparing the proposals received.
- Write comprehensive reports for governance reviews, prospective client marketing, fund rationalizations and financial attribution including meaningful descriptions, analysis and recommendations.
- Preparing monthly financial market overviews, including individual fund performance updates using Morningstar Direct, detailed quantitative and qualitative analysis based on individual client requirements, as outlined by the Consultant.
- Crafting a central database of benchmarks by industry, size and plan type.
- Assist with developing plan designs and investment dashboards for new groups, changes and illustrate the financial implications to the client.
- Assist with recommendations for improvements in plan designs and help to identify any areas of risk for the client.
- Prepare presentations for client renewal and prospect meetings.
- Attend client meetings with Consultants and act as a technical resource as required.
- Update workflow on a regular basis, at least weekly.
- Communicate regularly with management, regarding developing trends.
- Continually build strong working relationships with insurers.
- Other duties as assigned, including (but not limited to) backing-up other Reporting and Analytics team members.

*We are committed to providing accommodation upon request for applicants and employees with disabilities.*

## REQUIREMENTS:

- Strong verbal and written communication skills (in English).
- Strong working mathematical skills.
- Ability to multi-task and prioritize workload.
- Must be analytical and possess strong decision making skills.
- Ability to work independently.
- Results focused, pro-active and service-oriented.
- Minimum 5+ years experience in financial products
- LLQP minimum requirement and MFDA or IIROC license(s)
- CSC or CFP minimum designation-CFA level II or higher preferred
- University economics business degree preferred
- Strong knowledge of wealth management products and services
- Excellent computer software usage skills, including Power point, Excel and Morningstar Direct.

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