Your Plan with CPO Peter Shena

2016 was a record year for service demand, which really put our Advise and Protect mission to the test. I'm very proud of how we were there to help our members.

Certified Financial Planners®

In fact, our Advisors met one-on-one with more than 3,000 members, helping them make sound pension decisions that protect their financial health. Our experience with advisory services has really highlighted the need to help our members build out their retirement and overall financial literacy.

In 2016, we piloted education sessions for early-career members. We incorporated key financial planning concepts to help members understand how their pension fits into their broader financial plan, particularly at a time when they are faced with competing financial priorities.

In our view, this is key to members understanding how pension decisions can impact their overall financial plan.

Online Tools and Services

To help our members with their planning, we offer online tools, like our comprehensive Retirement Planner and the Pension Estimator. There is an increasing demand for these tools and other online services from our members. We also believe they are crucial to helping them understand how pension decisions, like purchasing a leave of absence or simply choosing the right retirement date, can impact their overall financial health.

Our service model is not designed to push members to exclusively conduct transactions online. Our focus is on creating tools that empower members with the information they need to come back to us and have meaningful discussions with our Advisors.

For Your Future

As we continue to build out our online tools and services, we also need to ensure our pension administration systems remain current, and can support our advisory services model. So, in 2017, we're going to conduct a review of our existing systems, to identify how to modernize them, so we can expand our online tools and services to better serve our members.