



# PENSIONS + BENEFITS

*an advisory & brokerage firm*

A People Corporation Company

497 Elizabeth Street, Burlington, ON L7R 2M4 ● 888.899.6956 / 905.632.7557  
wp@wpbenefits.ca ● www.wpbenefits.ca

## WP Pensions + Benefits – Principals & Managing Partners

**Ilija Parojcic**  
ilija@wpbenefits.ca  
Extension 201

**Geordie Watson**  
geordie@wpbenefits.ca  
Extension 202

## Office Operations

**Cheryl Vinnai**  
**Operations Manager**  
cheryl@wpbenefits.ca  
Extension 203

- Oversee all operations and including property management
- Oversee Client Relationship Manager (CRM)
- Accounts payables and receivables
- Group benefits support to plan administrators and members
- Enrolment and claims issues

**Terri-Lyn Dean**  
**Receptionist**  
**Administrative Assistant**  
Terry-Lyn@wpbenefits.ca  
Extension 250

- First-line reception
- Phone call administration
- Mail functions
- Document preparation
- Event and meeting coordination

## Group Benefits

**Rachel Janecka**  
**Benefits Consultant**  
rachel@wpbenefits.ca  
Extension 206

- Benefit renewal analysis/reporting
- Experience analysis/reporting
- Plan design costings
- Market research

**Kaitlyn Earle**  
**Client Management**  
Kaitlyn@wpbenefits.ca  
Extension 211

- Group benefit administration
  - Coverage and invoice inquiries
  - Member and dependent eligibility
  - Carrier enrolment forms
  - Terminations
  - Salary updates
  - Insurer billing
- Group claim issues/inquiries
- Liaise between the group clients and insurance carriers
- Insurance carrier group implementations

## Group Pension

<p><b>Luisa Helling</b> <b>Pension Retirement Coordinator</b> luisa@wpbenefits.ca Extension 204</p>	<ul style="list-style-type: none"><li>• Form inquiries (Application, Member Information, Investment Change, Beneficiary change)</li><li>• Plan administrator form/member inquiries</li><li>• Member inquiries<ul style="list-style-type: none"><li>▪ Termination</li><li>▪ Retirement</li><li>▪ Accessing/transferring pension</li></ul></li><li>• Coordination of death claims<ul style="list-style-type: none"><li>▪ Current members or individual accounts</li></ul></li><li>• Income tax reporting<ul style="list-style-type: none"><li>▪ Send tax (tax-exempt) letters for income tax reporting</li></ul></li></ul>
<p><b>Brittanie Swann</b> <b>Pension Administration</b> Brittanie@wpbenefits.ca Extension 205</p>	<ul style="list-style-type: none"><li>• New plan implementation</li><li>• Plan amendments</li><li>• Plan terminations</li><li>• Legislative updates and reviews (FSCO, OSFI and Insurer)</li><li>• Annual plan reviews</li><li>• Request for Proposal process and pricing</li><li>• Client training<ul style="list-style-type: none"><li>▪ Pension Plan rules</li><li>▪ Legislation</li><li>▪ Annual Filing</li><li>▪ Online GRS training</li></ul></li><li>• Liaison between insurer and client</li></ul>
<p><b>Cynthia Holder</b> <b>Pension Consultant</b> Cynthia@wpbenefits.ca Extension 207</p>	<ul style="list-style-type: none"><li>• Plan management<ul style="list-style-type: none"><li>▪ Providing Annual plan reviews</li><li>▪ Assisting the plan administrator with day-to-day administration concerns or questions</li></ul></li><li>• Providing education for member/plan administrators Provide plan administrator training on plan rules, legislation, GRS and filing</li><li>• Plan implementations, amendments and terminations</li><li>• Legislative updates and reviews (FSCO, OSFI and Insurer)</li><li>• Client training</li><li>• Liaison between insurer and client</li></ul>
<p><b>Robert Lagrotteria</b> <b>Marketing &amp; Member Engagement</b> rob@wpbenefits.ca Extension 213</p>	<ul style="list-style-type: none"><li>• Managing marketing functions</li><li>• Develop marketing strategies</li><li>• Co-ordinating marketing campaigns with sales activities.</li><li>• Planning and implementing promotional campaigns.</li><li>• Development of member engagement materials / campaigns</li><li>• Member pension consulting</li></ul>



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