



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



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