

Disability Planning Helpline Advisor

Posting Date: Friday, May 2nd

Organization: [Plan Institute](#)

Position Type: Part-time, contractual, remote (anywhere in Canada)

Hours: 25-50 hrs/month (split roughly evenly each week) depending on availability. Please note there may be opportunity to increase hours according to demand for service and your availability/interest.

Anticipated Start Date: June 16th, 2025, or earlier

Compensation: \$32/hour

About Plan Institute

Plan Institute is a nationally registered charity, whose mission is to empower people with disabilities to lead a good life. We do this through:

- **Innovation** – We engage in social innovation through community-based projects and partnerships that help empower those living with disabilities.
- **Education** – We offer educational initiatives designed for individuals, families, and organizations, including workshops, courses, retreats, publications, and resources.
- **Leadership** – We provide collaborative leadership by convening a diverse group of stakeholders to encourage public policy reform and system transformation.

Plan Institute envisions a future where all people with disabilities lead a good life. For Plan Institute, the concept of a good life means being financially secure; contributing to and participating in caring and inclusive communities; being respected and empowered to make decisions; knowing the loving support of friends and family; choosing a place to live and call home; and having a well-planned future.

In this 2019 video, we discuss why Plan Institute was founded, some of our accomplishments over the years, and our hopes for the future: [Plan Institute 20th Anniversary Video](#).

Visit our website to find out more: www.planinstitute.ca.

About the position

This position will provide direct support through our [Disability Planning Helpline](#) to individuals with disabilities, families, and professionals requesting assistance with understanding and applying for the Disability Tax Credit (DTC), the [Canada Disability Benefit \(CDB\)](#), and other disability benefits and supports.

You will join a team of like-minded Helpline Advisors who support individuals across Canada with questions about these topics as well as the [Registered Disability Savings Plan \(RDSP\)](#), wills, trusts, other estate planning considerations, advocacy approaches, provincial/territorial disability assistance programs, social network building, and more. Our Helpline Advisors bring a wealth of professional and lived experience, most having lived with, or supported family members who have, a disability.

People can connect with the Helpline by calling or emailing in at any time and a Plan Institute team member will direct the query to the appropriate advisor. Hours of work are at the discretion of the advisor. You will be expected to manage your own time and meet Plan Institute's expected response times. Since this position is remote, you must also have access to a private office space that you can use to ensure the confidentiality of the people you support.

This position offers the opportunity to work with a fantastic team of caring, empathetic, and talented people while making a positive impact in the community and on the lives of people with disabilities and their families.

[Learn more about our Disability Planning Helpline.](#)

Tasks and Responsibilities:

- Providing one-to-one support to individuals requesting assistance via phone, video call, or email, including follow-up when necessary. This includes but is not limited to:
 - Supporting individuals with applying for the DTC, including creating sample DTC application forms that applicants can take to their medical practitioner
 - Advocacy and appeal support
 - Helping individuals apply for the CDB once it is released.
- Completing all required reporting information following each consultation.
- Working with our partner organizations to help support and refer individuals requiring assistance as needed.
- Attending monthly virtual team meetings and occasional training.
- Invoicing for services provided monthly (invoice must be received within 30 days of completion of work) – template will be provided.
- Other tasks as required.

Job Requirements:

To be considered for this position, your application must clearly demonstrate how you meet the skills and experience as outlined below:

- Advanced knowledge of the DTC.
- Basic knowledge of the CDB and RDSP.
- Strong communication and interpersonal skills, including the ability to communicate with empathy while supporting people who may be experiencing multiple challenges.
- Strong time management skills.
- Initiative-taker with the ability to work with minimal supervision.
- Quick learner who is comfortable asking for help and clarification as needed.
- Exceptionally organized and detail oriented.

- Ability to work collaboratively within a team setting and independently.
- Computer/laptop and reliable internet connection.

Other skills/knowledge preferred but not required:

- Applicants who have personal, lived experience of disability through themselves, a close relative or friend, or organizational work.
- Experience providing one-on-one support on the phone and email.
- Knowledge of and familiarity with other disability benefits and disability planning topics, such as wills, trusts, supported decision making agreements, advocacy approaches, and provincial/territorial disability assistance programs.
- Understanding of and experience in the family-led disability movement and other marginalized populations.
- Understanding of asset-based community development, which relates to the belief that everyone in the community has something to offer and contribute.
- Ability to communicate in multiple languages.
- Experience with giving presentations, as well as blog or article writing. This is not required for this position but depending on your interest and availability there may be opportunities available to participate in our presentations and resource development.

How to Apply:

Please apply here. Please note that applications will only be accepted through our application form.

- Job posting closes on Monday, May 26th, 2025, at 8 AM PT.
- We thank all applicants for their consideration of this position. Shortlisted applicants will be contacted by Friday, May 30th, 2025.
- If you have any questions about the position, please contact info@planinstitute.ca.

A cover letter is NOT required to apply.

Plan Institute is committed to a safe, inclusive, and collaborative environment in which all individuals are treated with respect and dignity. As such, individuals from diverse backgrounds, including race, national or ethnic origin, sexual orientation, gender identity, disability, and mental illness are welcomed and encouraged to apply.

We welcome and encourage applications from people with disabilities. Accommodations are available on request for candidates taking part in all aspects of the selection process. Accessible formats and communication supports are available for applicants by request; please contact info@planinstitute.ca.