



Disability Planning Helpline Advisor

Posting Date: Thursday, July 16, 2026

Organization: Plan Institute

Position Type: Contractual, part-time, remote (anywhere in Canada)

Hours: 25-50 hrs/month (split roughly evenly each week) depending on availability. Please note that monthly hours depend on demand for support and are not guaranteed. There may also be opportunity to increase hours according to demand and your availability/interest.

Anticipated Start Date: The week of August 31, 2026

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 a range of disability-related benefits and supports. The ideal candidate will have detailed knowledge and expertise in at least one of the following topics: Disability Tax Credit (DTC) and tax filing, the Registered Disability Savings Plan (RDSP), and wills, trusts and estate planning considerations. We especially welcome applications from disabled folks with lived experience.



You will join a team of like-minded Helpline Advisors who support individuals across Canada with questions about these topics as well as the Canada Disability Benefit (CDB), the Canada Pension Plan Disability (CPPD), 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.

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
 - Information and support with tax filing, the RDSP and/or wills, trusts and estate planning
- 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 10 days of completion of work for the month) – 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 in at least one of the following three areas:
 - the DTC and tax filing
 - the RDSP
 - wills, trusts and estate planning considerations



- Lived experience of disability, either as a disabled person yourself or as a family member or caregiver
- 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:

- 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 the Canada Pension Plan Disability (CPPD), the CDB, 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.
- Fluency in French.
- Ability to communicate in a language or languages other than English and French.
- 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 Wednesday, August 5, 2026 at 11.59pm.
- We thank all applicants for their consideration of this position. We anticipate shortlisted applicants will be contacted by Friday, August 7, 2026.
- If you have any questions about the position, please contact info@planinstitute.ca.

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.