

Position Title: Pension & Annuity Representative I
Department: Pension & Annuity
FLSA: Non-Exempt
Reports to: Pension & Annuity Supervisor

Description

Responsible for processing pension and annuity benefits and delivering customer service to clients and fund professionals in accordance with applicable plan rules and regulatory requirements.

Skills / Knowledge Requirements

- High School Diploma or GED
- Knowledgeable on pension and annuity fund rules and regulations
- Proficient in math
- 10-key by touch
- Computer literate in Word, Excel, and other Microsoft applications
- Good communication and organizational skills

Duties

- Service client and fund professional inquiries
- Process pension and annuity benefits
- Submit benefits information to plan custodian
- File maintenance for all clients and fund professionals
- Assist with client mailings and regulatory notices
- Maintain status reports and provide reports as needed

Other Duties

- Assist with receptionist relief as needed
- Other duties as assigned

Physical Demands

- Lift and carry file boxes within the office
- Shift and adjust file cabinet drawers as needed

Working Conditions

- Indoors, air-conditioned office

Work Shift

- Monday to Friday, 8:00 AM – 4:00PM or 8:30 AM – 4:30 PM, 1-hour unpaid lunch
- The duties assigned may involve situations that will require overtime