Pacific Administrators, Inc.
An Equal Opportunity Employer

Position Title: Pension & Annuity Manager/Administrator
Department: Administration
FLSA: Exempt
Reports to: President/CEO

Description
The Pension and Annuity Benefits Operations Manager/Administrator works under the direction of the company's President to service clients by managing relationships and directing and coordinating assigned projects. The Pension and Annuity Benefits Operations Manager/Administrator will work closely with the Funds' Legal Counsels, Consultants, Trustees and other professionals to provide client services as outlined in the Client Administrative Services Agreement. The Pension and Annuity Benefits Operations Manager/Administrator is responsible for accurate, proper and timely execution of all assigned work and is required to have technical and public relationship skills to deliver a level of service that consistently meets or exceeds client expectations. Serves as operational manager for the Pension and Annuity department and "rolls up sleeves" provide department oversight, "hands on learning, training and processing" to ensure timely benefit application processing turnaround time is maintained. Directly supports achievement of Company Key Performance Indicator related projects.

Skills / Knowledge Requirements
- Timely communicator (send/receive, follow up without being asked)
- Highly organized – Prioritize, calendar tasks, monitor, assimilate new tasks
- Hands-on – Rolls up sleeves as department manager to not only monitor workflow, but learn duties and help when needed
- Able to build and manage long-term relationships with the Funds legal counsels, consultants, trustees and plan participants
- Excellent oral and written communication skills with the ability to deliver clear, concise and accurate oral and written correspondence; listen carefully to others; use appropriate examples and/or analogies to clarify ideas and issues when necessary; be able to speak to various size groups varying from members, plan professionals and/or trustees
- Excellent organizing, planning and time management skills – must have the ability to establish priorities and objectives; to gather, classify, categorize and readily retrieve information to meet deadlines
- Good problem solving and decision-making skills with the ability to use sound and logical judgment in problem resolution with the ability to generate innovative alternative solutions
- Able to be flexible to maintain constructive behavior in the face of adversity; to be able to manage stress and prioritize assigned tasks; change course of action when appropriate
- Able to take initiative for action by oneself without direction from others; to anticipate and develop solutions to problems without the aid of others for assigned projects
- Able to work in a team environment, delegate effectively, work harmoniously with others and foster teamwork
- Attention to detail and the ability to handle multiple projects and duties at one time
- Supervisory experience is required and able to manage others
- Able to analyze, interpret and understand complex contracts or other legal documents
- Able to research and/or respond effectively to inquiries
- Able to balance conflicting priorities and appropriately respond
- Proficient in Microsoft Office Suite (Word, Excel, PowerPoint, etc.)
- Bachelor's degree (and related work experience) in Accounting, Human Resources, Finance, Operations Management
- Experience working with Taft-Hartley Funds a plus
- Experience in pension and annuity benefit application (and supporting document compilation including review of participant divorce decrees/Qualified Domestic Relations Orders, and) processing, annual annuity fund reconciliations and software system participant benefit statement preparation process (in relation to plan consultant annual specification letter), annual pension data file extract and reporting and reconciliation process (in relation to plan participant annual specification letter), and participating signatory employer withdrawal liability situations
- Vehicle (automobile) and valid driver's license is required

Job Description
Position Title : Pension & Annuity Manager/Administrator

Duties

- Attend client trust meetings, benefit fairs, union membership, new hire orientation and educational conferences
- Receive and respond to client inquiries including benefit and claim questions and issues
- Review and analysis of monthly financial statements and disbursements
- Prepare and finalize meeting minutes, reports and agenda items
- Knowledge of ERISA, current legislation and Department of Labor guidelines
- Management of internal relationships to ensure compliance with client-specific procedures
- Interpretation and application of Plan Documents and Summary Plan Descriptions (SPD) and all other Fund policies
- Planning, analyzing and evaluating information and company output relevant to assigned client projects and needs.
- Manager to the assigned department supervisor to assist with staff development, training and performance
- Assist department supervisor to manage and coordinate department workload for timely completion of assigned responsibilities and projects
- Reviews client coverage contracts and amendments for accuracy
- Market new and renewal business
- Manage proposals for renewals, identify content
- Prepare employee, client and vendor communication material

Other Duties

- Neighbor island and mainland travel is required for client meetings and educational conferences
- Other duties as assigned

Physical Demands

- Drive to client or various locations for attendance of duties requirements
- For neighbor island and mainland travel, there may be early morning flight departure and evening flight return
- Neighbor island and mainland travel may require driving a rental car to locations and to stay overnight or longer as required
- Carry, load, and transport supplies, deliveries
- Lift and carry file boxes within the office
- Shift and adjust file cabinet drawers as necessary

Working Conditions

- Indoors, air-conditioned office
- Conditions will vary at client locations

Work Shift

- Monday to Friday, 8:00 – 4:00 PM or 8:30 AM – 4:30 PM, 1 hour unpaid lunch
- The duties assigned will have situations that will require overtime
- Weekends as needed for client meetings, benefit fairs or educational conferences