

Position Title: Pension & Annuity Supervisor  
Department: Pension & Annuity  
FLSA: Exempt  
Reports to: Pension & Annuity Manager

#### Description

Responsible for developing, supervising, and motivating department staff to ensure timely completion of assigned department responsibilities and projects. Consistently following policies and procedures for implementing supervisory responsibilities.

#### Skills / Knowledge Requirements

- Educational degree in a related field (or equivalent combination of education, professional training, or work experience which demonstrates the ability to perform the duties of the position)
- Be knowledgeable of rules and regulations on Pension and Annuity benefits
- Proficient in math
- Computer literate in Word and Excel
- 10 key by touch
- Good communication skills, verbal and written
- Excellent customer service skills
- Supervisory experience

#### Duties

- Plans and develops training for staff
- Create and maintain all department documentation
- Assign, coordinate, and monitor all department duties and responsibilities
- Ensure that staff is compliant with company policies and procedures
- Prepare and administer staff performance reviews and goals
- Assist staff in resolving any complaints from clients or fund professionals
- Perform fund related calculations in accordance with plan requirements
- Assist with client mailings and regulatory notices
- Assist processors and customer service representatives
- Attend Benefit Fairs as needed

#### Other Duties

- Neighbor island travel may be required for client meetings
- Receptionist relief as needed
- Other duties as assigned

#### Physical Demands

- Drive to client or various locations for attendance of duties requirements
- For neighbor island, there may be early morning flight departure and evening flight return
- Neighbor island 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

Job Description

Position: Pension & Annuity Supervisor

Work Shift

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