

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

Description

Responsible for assisting in the oversight of Pension and Annuity Department operations, including collaboration with the Fund's legal counsel, plan actuaries, and Trustees.

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
- Ability to multi-task
- Self-starter and be able to work independently
- Customer service and processor experience

Duties

- Process pension and annuity benefits
- Assist with performing fund related calculations in accordance with plan requirements
- Assist with preparing for client meetings
- Assist with servicing client and fund professional inquiries
- Assist with data conversion when necessary
- Assist with department training
- Assist with client mailings and regulatory notices
- Back up to attend client meetings

Other Duties

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

Physical Demands

- Drive to client or various locations for attendance of duties requirements
- 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 AM – 4:00PM or 8:30 AM – 4:30 PM, 1 hour unpaid lunch
- The duties assigned may involve situations that will require overtime