

RETIREMENT COUNSELOR I/II

Definition

Under supervision, is responsible for providing members with high quality counseling services on a variety of retirement policies and programs; assists in the development of policies and programs to better service the changing needs of the members of the Retirement System.

SUPERVISION RECEIVED/EXERCISED

Receives supervision from the Retirement Benefits Manager. Exercises no supervision.

DISTINGUISHING CHARACTERISTICS

The Retirement Counselor performs a variety of duties in the areas of counseling of retirement benefits and options, disability retirement, and retiree payroll. Positions in these classes are flexibly staffed. Retirement Counselor I incumbents are expected to progress with appropriate training, experience and satisfactory performance, to Retirement Counselor II, the journey level of the class series.

Retirement Counselor I: This is the entry level in the Retirement Counselor series. Initially under direct supervision, incumbents learn retirement office procedures and provisions of the retirement systems and programs. Incumbents receive training, close supervision and review of assignments. This class is distinguished from Retirement Counselor II in that the latter is the journey level class performing duties with independence and judgment on matters related to established procedures and methods. As experience is gained, there is greater independence of action within established guidelines.

Retirement Counselor II: This is the journey level class of this series, competent to independently perform a wide variety of responsible duties and tasks with minimum supervision and with the ability to exercise greater judgment in the performance of these duties. This position is responsible for establishing effective interpersonal relationships at all organizational levels and have the ability to effectively listen, understand, interpret, counsel and apply legal principles and practices. This class is distinguished from Retirement Counselor I in that the former is the entry-level, training class in the series.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES

(May include but are not limited to the following.)

Counseling Relations

Respond orally or in writing to a wide variety of retirement benefit questions for active, deferred, and retired members, clearly articulating their various options so members can make informed retirement planning choices.

Verify eligibility, prepare estimates of benefits payable and counsel members and their beneficiaries on benefit options, service purchases, service and disability retirement, the Deferred Retirement Option Program (DROP), the Post Retirement Supplemental Benefit (PRSB), and death benefits.

Coordinate reciprocal benefits with other retirement systems.

Prepare presentations and speak before groups of members to explain plan benefits.

Process and apply member contributions from City payroll to employee retirement accounts as maintained in Pension administration software and apply the monthly interest and annual cost of living increases to accounts.

Disability Determinations

Evaluate and accurately calculate member disability retirement benefits.

Interview and counsel members contemplating disability retirement. Advise applicant of benefit options; assist in the completion of application forms, tax withholding forms, and beneficiary forms; explain tax liability of disability benefits.

Respond orally or in writing to a wide variety of disability retirement benefits questions from applicants, attorneys, medical experts, hearing officers, witnesses, department heads and others.

Organize all pertinent documentation and send the prepared records to the Boards' medical advisor for a recommendation.

Retiree Payroll

Responsible for the processing, and distribution of monthly retirement payroll.

Communicate verbally and in writing with eligible beneficiaries of death benefits. Handle all routine correspondence and inquiries from retired members.

Research, prepare, and submit materials and reports to the Retirement Boards.

Interpret and implement new Federal and State laws and regulations affecting retirement benefits and payroll operations.

Prepare, process, and distribute annual actuary information to actuary. Provide pension actuarial data verification

Perform related duties as assigned.

JOB RELATED AND ESSENTIAL QUALIFICATIONS

Knowledge of:

Knowledge and ability to interpret and apply laws relating to public pension systems, long-term disability, death/survivor benefits and related provisions of California and Federal law.

Terminology, methods, techniques, and practices of data collection, elementary statistics, and report writing related to retirement issues.

Skill to:

Operate an office computer and a variety of word processing, spreadsheet, and software applications.

Ability to:

Apply principles of logic to define problems, analyze data and evaluate and select from possible alternatives for problem resolution.

Understand, interpret, and apply rules, regulations, laws, and ordinances and make sound recommendations.

Communicate clearly and concisely, both orally and in writing to individual members, groups and committees, and prepare clear and concise written reports, oral presentations, and correspondence.

Interpret and edit written materials and follow oral and written instructions.

Establish and maintain positive working relationships with representatives of community organizations, state/local agencies and associations, City management and staff, and the public.

MINIMUM QUALIFICATIONS

Retirement Counselor I

Experience:

Two years of technical level experience in a retirement, insurance, or government benefit program, or in a personnel system that involves retirement benefit experience.

Education:

Completion of fifteen semester units of accredited college or university course work towards a degree in business administration, public administration, or a closely related field.

Retirement Counselor II

Experience:

One year of experience as a Retirement Counselor I with the City of Fresno or equivalent.

Education:

Completion of fifteen semester units of accredited college or university course work towards a degree in business administration, public administration, or a closely related field.

Special Requirement(s):

Possession of a valid Driver's License may be required at the time of appointment.

APPROVED: (Signature on file)
Director of Personnel Services

DATE: 06/23/04