

RETIREMENT COUNSELOR I/II

DEFINITION

Under supervision, a Retirement Counselor is responsible for providing high quality counseling services on a variety of retirement policies and programs in compliance with the Fresno Municipal Code, City Memorandum of Understandings, City Annual Salary Resolution, and other pertinent retirement related provisions.

SUPERVISION RECEIVED/EXERCISED

Receives supervision from the Senior Retirement Counselor. Exercises no supervision.

DISTINGUISHING CHARACTERISTICS

The Retirement Counselor performs a variety of duties in the areas of counseling of retirement benefits and options, service and 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. As experience is gained, there is greater independence of action within established guidelines. 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.

Retirement Counselor II: This is the journey level class of this series. Incumbents 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 positive working relationships at all organizational levels, demonstrating the ability to effectively listen, understand, interpret, counsel and apply established procedures and methods, 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

Communicate clearly and concisely, orally and in writing regarding a wide variety of retirement benefits including benefit options, service purchases, service and disability retirement, the

Deferred Retirement Option Program (DROP), the Post Retirement Supplemental Benefit (PRSB), and death benefits. Verify eligibility and prepare estimates of benefits payable.

Coordinate and calculate reciprocal benefits in compliance with the Retirement Systems' agreement with CalPERS. Coordinate and calculate retirement benefits pursuant to domestic relations orders.

Prepare materials and conduct presentations before groups to explain plan benefits.

Respond to retirement related public records requests in compliance with City Administrative Orders and Joint Retirement Board Policies.

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

Disability

Interview members contemplating disability retirement. Advise of the disability application process, policies and procedures, tax liability of disability benefits, and benefit options including impact to reciprocal benefits if applicable.

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

Organize and track all pertinent documentation for consideration and recommendation by the Joint Retirement Board's Legal Counsel and outside medical advisor.

Evaluate and accurately calculate disability retirement benefits including years of service reconciliations, final average salary adjustments, and 1099-R corrections.

Adhere to City Administrative Orders and Joint Retirement Board Policies in the administration of confidential medical records.

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

Payroll

Responsible for the processing and distribution of monthly retirement payroll.

Calculate benefits payable, including final average salary calculations for DROP Actives and non-DROP retirees. Process contribution and interest refunds and survivor benefit payments.

Process and apply retirement contributions and interest. Reconcile discrepancies. Calculate, apply, and reconcile annual cost of living adjustments for active DROPS and retirees.

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, reconcile, and distribute annual 1099s in compliance with State and Federal tax laws. Prepare, process, and distribute annual information to the Joint Retirement Board's actuary and auditor.

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, analysis and reconciliation, elementary statistics, and report writing related to retirement issues.

Skill/Ability to:

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

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 (2) years of technical level experience in a retirement, payroll, or government benefit program, or in a personnel system that involves retirement benefit experience.

Education:

Completion of fifteen (15) 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 (1) year of experience as a Retirement Counselor I with the City of Fresno or equivalent.

Education:

Completion of fifteen (15) semester units of accredited college or university course work towards a degree in business administration, public administration, or a closely related field.

APPROVED: (Signature on File)
Director of Personnel Services

DATE: 7/27/2026