

RETIREMENT ADVISOR

Nature of Work: Under general supervision, prepares benefit estimates for retiring system members and for members retiring on disability; calculates total service, verifies contributions and prepares estimates; responds to requests for information via written correspondence and telephone. Performs related work as required.

Examples of Work

Verifies members' years of service and contributions.
Calculates total contributions and annuity amounts for members anticipating retirement.
Codes and updates withdrawing members files.
Verifies computation of death benefits and calculates total amount to be issued to the named beneficiary.
Verifies and updates membership reports and computer lists.
Review and verify statements of contributions and service prior to mailing.
Provides information to inquiring members via written correspondence and telephone.
Performed related work as required.

Knowledge, Skills and Abilities

Knowledge of office methods, practices and procedures.
Knowledge of arithmetic, English, and spelling.
Ability to operate calculator and other office equipment.
Ability to communicate effectively both orally and in writing.

Minimum Qualifications

Training: Education equivalent to graduation from a standard four-year high school.

Experience: Three (3) years of full-time or equivalent part-time paid experience in general clerical work, one year of which must have included payroll or benefits related experience.

Substitution: Successful completion of study in an accredited college or university, or related resident business or vocational school training may be substituted for the general experience on a year-for-year basis.

Established: 9/19/90
Effective: 10/16/90