

9301

RETIREMENT ADVISOR, SENIOR

Nature of Work: Under administrative direction, reviews and approves benefit estimates prepared by subordinates; prepares monthly retirement agenda and verifies accuracy; incumbent prepares "walk-in" requests for benefit estimates for members. Serves as lead worker in overseeing the work assignments of Retirement Advisors and other staff. Responds to requests for information via written correspondence and telephone. Performs related work as required.

Examples of Work

Reviews and approves calculated benefit and retirement profiles prepared by advisors under immediate supervision. Prepares and verifies monthly retirement agenda. Calculates total contributions and annuity amounts for members who request retirement profiles in person. Plans, organizes, assigns, and checks work of retirement advisors under immediate supervision. Trains new employees in proper work methods and procedures.

Knowledge, Skills and Abilities

Knowledge of program policies, rules and regulations.
Knowledge of office methods, practices and procedures.
Knowledge of arithmetic, English, and spelling.
Ability to operate calculator and other office equipment.
Ability to establish and maintain effective working relationships with other employees and the public.
Ability to communicate effectively both orally and in writing.

Minimum Qualifications

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

Experience: Five (5) years of full-time or equivalent part-time paid experience in general clerical work, one year of which must have included benefit estimation 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 required general experience on a year-for-year basis.

Established: 9/19/90
Revised: 7/13/05
Effective: 7/13/05