

<b>Job title</b>	<i>Pension Administration Specialist</i>
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### **Job purpose**

This position is responsible for operational tasks associated with servicing qualified defined benefit pension plans in compliance with plan provisions and administrative policies. The role handles/assists in maintaining pension data and calculating benefits. Responsibilities include answering client and participant requests over the telephone or through written correspondence, retaining accuracy of current participant database, and helping participants comply with plan rules and procedures.

### **Duties and responsibilities**

- Respond to participant/member calls and facilitate requests
- Perform benefit calculations using tools provided and review for inconsistencies
- Consult with participants/members on pension plan provisions and payment elections
- Handle benefit plan administration and management of special projects associated with defined benefit plans for various clients
- Review participant/member data and clean up if information is missing or inaccurate
- Maintain client databases and benefit calculation log
- Coordinate monthly pension payments with trustee
- Assist with the testing of the system for new clients according to the plan provisions and administrative requirements
- Customize employee communication material
- Maintain current knowledge of client specific plan provisions
- Performs other duties as assigned by management.

### **Qualifications**

- Bachelor's degree with demonstrated mathematical/analytical skills
- Entry level to 5 years of prior experience
- Solid communication skills: written, proofreading and phone
- Ability to maintain accuracy and attention to detail in a fast-paced environment
- Works well under pressure and within time constraints to effectively deliver individual and team objectives.
- Strong organizational and time-management skills, ability to multi-task and to prioritize tasks on a daily basis
- Ability to work independently with minimal supervision
- Problem solving and analytical capability
- Proficient in Microsoft Office suite of products, particularly Word, Excel, and Access
- Bilingual skills (Spanish) a plus