RETIREMENT BENEFITS COUNSELOR

This is administrative and consultative work in explaining and interpreting the benefits programs administered by the Retirement Systems Division in the Department of State Treasurer,

Employees respond to inquiries concerning fringe benefits from active and retired system members, their beneficiaries, and the employing agencies either in writing, by phone or in person. Employees assess individual situations applying current statutes regulations, and communicate the appropriate decisions to involved parties. Work also involves conducting large group meetings and seminars for prospective retirees, new members, personnel officers, employee and retiree associations, and other interested groups. Employees may occasionally be assigned special projects, and are given responsibility for a special area of expertise. Employees may perform other related duties as determined by the supervisor.

I. DIFFICULTY OF WORK:

Variety and Scope - Employees talk with system members, their dependents, or other involved parties to evaluate each individual situation and make a determination on eligibility, privileges, obligations, options, and benefits. Employees make presentations statewide on a variety of retirement benefits and policies, including social security and health benefits, to both large and small groups. Work involves handling occasional special projects such as updating the script used in group presentations. Employees are also assigned special area of expertise for which to serve as a resource, such as medical benefits or federal taxation.

Intricacy - Employees provide financial counseling to members in evaluating their case. Work requires objectively analyzing a member's situation, selecting and applying the appropriate regulations and formula, and communicating the various options available. Employees must work with a variety of different sets of legislation concerning retirement, depending on the date of enrollment and the laws in place at that time. Employees usually research information themselves, or in unusual cases refer to a specialist or supervisor for interpretation and analysis. The group presentations and seminars given include a question and answer period, during which employees must respond to any number of questions from an audience that may or may not be of similar background, needs, and level of understanding.

Subject Matter Complexity - Work requires a thorough understanding of retirement laws and their application, as well as related regulations and interpretations.

Guidelines - Guidelines include Attorney General's opinions, administrative codes, General Statutes (both current and historical), actuarial information, and other interpretations in evaluating cases.

II. RESPONSIBILITY:

Nature of Instructions - Employees function independently in carrying out day-to-day work. General instructions are given periodically in written and verbal forms.

Nature of Review - Work is reviewed periodically and on an after-the-fact basis due to volume and time constraints.

Scope of Decisions - Work has a direct affect on all Retirement System members, both active and retired, and potentially their relatives or anyone involved in their estate. The Retirement System itself is also affected by the quality of decisions made.

Consequence of Decisions - Decisions directly impact the quality of members' retirement plans. Inaccuracy could result in financial consequences for the Retirement System and its members.

III. INTERPERSONAL COMMUNICATIONS:

Scope of Contacts - Work requires constant contact with a wide range of the public, including active state employees and retirees and their dependents, state agency representatives, and legal and medical professionals.

Nature and Purpose - Contacts are for the purpose of explaining and interpreting retirement statutes and options to individuals, and overall retirement regulations and procedures to groups and individuals.

IV. OTHER WORK DEMANDS:

Work Conditions - Work is generally performed in a normal office setting.

Hazards - Potential for hazard exists only in the occurrence of travel involved in conducting statewide seminars and group meetings.

V. RECRUITMENT STANDARDS:

Knowledges, Skills, & Abilities - Considerable knowledge of retirement' laws, regulations, and procedures. Ability to analyze, research and interpret information of a technical, mathematical or financial nature. Ability to prepare and conduct instructional group presentations. Ability to communicate effectively in both oral and written form with a wide variety of people.

Minimum Training and Experience - Graduation from a four-year college or university with one-year of experience related to retirement or benefits administration or two-year progressively responsible administrative experience; or graduation from high school and five years experience in the administration of retirement or benefits programs; or an equivalent combination of training and experience.

Special Note - This is a generalized representation of positions in this class and is not intended to identify essential functions per ADA. Examples of work are primarily essential functions of the majority of positions in this class, but may not be applicable to all positions.