

## **SENIOR RETIREMENT COUNSELOR**

### **DEFINITION**

Under direction, performs difficult and complex work in a variety of areas within retirement benefit administration; provides training and direction to subordinate staff; assists in the development of policies and programs to better service the changing needs of the members of the Retirement Administration Office.

### **SUPERVISION RECEIVED/EXERCISED**

Receives supervision from the Retirement Benefits Manager. Provides supervision to assigned staff.

### **DISTINGUISHING CHARACTERISTICS**

The Senior Retirement Counselor is a supervisory class assigned to the Retirement Benefits Office. Incumbents provide training and direction to subordinates in the performance of a variety of duties in the areas of counseling of retirement benefits and options, disability retirement, and retiree payroll. This class is distinguished from Retirement Counselor II in that the latter is the journey level class of this series and provides no supervision. This class is distinguished from the Retirement Benefits Manager in that the latter handles more complex matters such as compliance with state and federal legislation, City codes affecting retirement benefits, and auditing City retirement benefits disbursements.

### **EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES**

May include but are not limited to the following:

Supervises, assigns, reviews, and evaluates services provided to retirement members and beneficiaries.

Coordinates retiree payroll activities with the accounting function; authorizes the payment of withdrawals, refunds, retiree payroll, death benefits, and other disbursements.

Assists in developing, implementing, and monitoring internal procedures and support systems for retirement administration.

Train subordinates to provide accurate guidance to members of the Retirement System regarding a wide variety of retirement benefit questions for active, deferred, and retired members, clearly articulating their various options so members can make informed retirement planning choices.

Verify eligibility, review Retirement Counselor I/II estimates of benefits payable, service purchases, service and disability retirement, the Deferred Retirement Option Program (DROP), the Post Retirement Supplemental Benefit (PRSB), and death benefits.

Coordinate reciprocal benefits with other retirement systems.

Process and apply member contributions from City payroll to employee retirement accounts as maintained in Pension administration software and apply the monthly interest and annual cost of living increases to accounts.

Review and advise Retirement Counselor I/II of member benefit options, the completion of application forms, tax-withholding forms, and beneficiary forms; explain tax liability of disability benefits.

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

Responsible for the processing and distribution of monthly retirement payroll.

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.

Provide pension actuarial data verification.

Perform related duties as required.

### **JOB RELATED AND ESSENTIAL QUALIFICATIONS**

#### **Knowledge of:**

Principles and practices of retirement benefits administration, including general knowledge of actuarial principles and budget development.

Terminology, methods, techniques, and practices of data collection, elementary statistics, and report writing related to retirement issues.

Principles and practices of employee coaching and training.

#### **Skill to:**

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

**Ability to:**

Interpret and apply state and federal laws relating to public pension systems, long-term disability, death/survivor benefits and related provisions of California and federal law.

Apply sound independent judgment within general policy and guidelines.

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.

Provide clear and concise direction to subordinates.

Plan, coordinate, supervise, review, and evaluate the completed retirement benefit forms, benefit calculations, beneficiary files, and other related documents.

Develop and maintain positive working relationships with representatives of community organizations, state/local agencies and associations, City management and staff, and the public.

**MINIMUM QUALIFICATIONS**

**Experience:**

Three years of experience independently performing in retirement benefits administration that includes service and disability retirement, deferred retirement benefits, death benefits, and interpreting and applying state and federal retirement laws which includes, or is supplemented by, one year of lead or supervisory work experience.

AND

**Education:**

Graduation from an accredited college or university with a Bachelor's degree in Human Resources, Business Administration, Public Administration, or a closely related field.

**Substitution:**

Additional qualifying experience may be substituted for the required education on a year for year basis.

**Special Requirement(s):**

Possession of a valid Driver's License may be required at the time of appointment.

APPROVED: \_\_\_\_\_  
Director of Personnel Services

DATE: \_\_\_\_\_

SCM:WM:Original 5/15/15