



Member Services Specialist, Senior
Fort Worth, TX
Full- time
Salary Range \$57,900 - \$73,800

The Fort Worth Employees' Retirement Fund is seeking to fill a full-time position to join the benefits team.

The candidate will conduct one-on-one counselling sessions, retirement seminar presentations, perform complex benefit calculations, process retirement applications, monthly retiree payroll and bi-weekly non-periodic payments. Candidate should understand actuarial concepts and have a strong mathematical aptitude. Candidate must be a team player willing to support other team members in the day-to-day operations. Candidate must have at least 4 years of experience in a similar role and a bachelor's degree in a relevant discipline. [See job description]

Candidate must submit to a pre-employment background verification FWERF is a drug-free workplace. Applicants should send resume to HR@fwretirement.org.

Job Description

TITLE: Member Services Specialist - Senior
REPORTS TO: Deputy Director
CLASS: Non-Exempt

GENERAL PURPOSE:

To coordinate and administer the activities and operations of the Retirement Fund's benefit programs (11,000 + members); including retirees and survivor benefit payments, retirement processing, the disability program, and death benefits.

ESSENTIAL DUTIES / RESPONSIBILITIES:

1. Conduct one-on-one pre-retirement counseling to active members.
2. Perform complex benefit calculations:
 - i. Calculate buybacks and service credit purchases.
 - ii. Run projected and final retirement benefit calculations.
3. Counsel family of deceased participants concerning death benefits, secure necessary verifications/authorizations, and process post-death retirement benefits.
4. Process periodic monthly and non-periodic bi-weekly retiree benefit payrolls.

5. Prepare contribution refund letters upon verification of termination of employment. Assist with roll-over and qualified transfer transactions. Research and verify archived contribution refund payments as necessary.
6. Prepare monthly meeting agenda detail of retirement applications for Board approval.
7. Update the pension administration system for all new and/or revised participant information.
8. Ensure that participant personal identifying information is kept confidential and securely filed.
9. Coordinate and conduct in-house and job-site retirement benefit seminars, securing guest speakers as necessary.
10. Coordinate and conduct home visits to home-bound participants.

OTHER DUTIES / RESPONSIBILITIES:

1. Review and verify qualified domestic relation orders in compliance with the model, working with internal and external legal counsel.
2. Function as one of the Retirement Fund's lead experts on the City of Fort Worth retirement ordinance, the Fund's Administrative Rules, and department procedures. Lend benefit provision knowledge to upgrading and/or procuring pension administration technology.
3. Administer the disability retirement program:
 - i. Schedule/coordinate independent medical record reviews and examinations with the Board's medical provider. Secure qualified medical providers as necessary.
 - ii. Coordinate the annual process to review and verify disability retirements in accordance with the City ordinance.
 - iii. Coordinate Disability Committee meetings, compile and distribute meeting packets, prepare Board meeting executive session agenda item.
 - iv. Ensure confidentiality and security of disability files.
4. Review and revise the retirement seminar presentation Power Point and related materials as necessary.
5. Manage periodic audits of system accuracy and efficiency such as COLA calculations, verification of life, and non-vested member contributions payable.
6. Oversee the member file system (both electronic and paper) to ensure accurate documentation and secure storage of member information.

JOB QUALIFICATIONS:

Knowledge, Skill and Ability:

Knowledge of:

- Defined Benefit Pension plans.
- Simple versus compounding interest.
- Business letter writing and advanced report preparation.
- Public meeting agenda packet preparation.
- Confidentiality requirements related to personal identifying information.
- Pertinent Federal, State and local laws, codes and regulations.
- Schedule and calendar maintenance.
- Banking and payroll processes.

Skills and Competencies:

- Team player
- Excellence in communication
- Problem solver
- Organized
- Ethical
- Detailed-oriented
- Comfortable and experienced in public speaking and seminar presentation
- Excellent at customer service
- Mathematical aptitude
- Experienced in Office applications: Word, Excel, Power Point, SharePoint
- Pension Administration system or Human Resources / Payroll system experience a plus

Ability to:

- Apply actuarial concepts.
- Understand the organization and operations of the Fund, the City of Fort Worth and of outside agencies as necessary to assume assigned responsibilities.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with team, Board, participants, and other stakeholders.
- Interpret and explain the Fund's Administrative Rules, policies, and procedures.
- Identify and respond to issues, concerns, and needs. Ability to recognize when escalation to supervisor is required.
- Operate a variety of office equipment and telephone systems; input and retrieve data and text; securely organize and maintain both paper and electronic filing.
- Prepare and review documents.
- Work independently when needed, meet deadlines.

Education, Formal Training or Experience:

Any combination of education, experience, and/or training that would likely provide the required knowledge, skills and ability will be considered as qualifying.

Experience: Four to five years of increasingly responsible human resources or employee benefits administration experience.

Education: Bachelor's degree in a relevant discipline.

Equipment and Software Directly Used: Networked personal computer with peripherals, fax machine, copy machine and telephone. Microsoft Office Software and other web-based systems.

Working Environment / Physical Activities: Office environment; exposure to computer screens; working closely with others. Essential and other important responsibilities and duties require maintaining physical condition necessary for sitting for prolonged periods of time; being able to lift and carry a minimum of 30 pounds; must be able to stand, reach bend and kneel; manual dexterity required.

Must submit to pre-employment background verification. FWERF is a drug-free workplace.