CLASSIFICATION SPECIFICATION

FLSA:	**NEXP**	**Job Code:**	**ACV73198**
Job Class Code:	**001**	**Salary Schedule:**	**AREG**
EEO Category:	**05**	**Grade:**	**16**
Workers Comp Code:	**8810**		

Job Code Established:	**12/19/96**	**Effective Date:**	
Job Code Revised:		**Effective Date:**	

JOB CODE SERIES: Retirement Advisor Series

JOB CODE TITLE: **RETIREMENT ADVISOR TRAINEE**

HRIS TITLE: **RETIREMENT ADVISOR TRNE**

WORK DESCRIPTION: Under direct supervision, is responsible for general eligibility and benefits determination; computing and processing benefit payments and estimates of benefit entitlement; and for providing routine retirement counseling, assisting active, inactive, disabled, retired members regarding benefits. The first of a three-level series, this class is distinguished from higher levels by its limited responsibility for in-depth involvement with employers, members, and employees through interpretation of laws, rules and regulations.

WORK ACTIVITIES: reviews member files.
Confirms employment dates, salary, credited service, retirement plan and options.
Calculates benefit estimates under various options.
Adjusts account as necessary.
Keys data from benefit calculation worksheets on computer terminal to obtain printout of benefit estimate and letter to requesting member.
Provides general information regarding rights and benefits, provisions of the law and regulations, tax liabilities, etc.
Performs related work as required.

WORK CONDITIONS: Works in a standard office environment. May require sitting for extended periods of time, close viewing of a computer screen, and repetitive movement of hands/fingers/wrists.

SUPERVISION: Work is periodically reviewed by higher level advisors or supervisor for guidance, accuracy and conformance to established policies and procedures.

WORK RESULTS/PRODUCTS: Completed benefit computations, settlement options and retirement plans; updated database records.

RESPONSIBILITY: Responsible to interact primarily with the membership of the retirement system, comprised of current employees and retirees, to provide information concerning procedures and various benefit options and for the resultant timely and accurate processing of related paperwork.

AUTHORITY: Calculate eligibility and compute benefits; key data on computer; schedule and prioritize work activities within established time frames.

KNOWLEDGE, SKILLS AND ABILITIES

Knowledge of: Requires knowledge of statutes and policies related to the retirement system; Accounting and auditing procedures; Basic financial planning principles and tax liabilities sufficient to provide general information to members.

Skill in: Analyze, interpret and apply laws, rules, and regulations applicable to the system; Verbal and written communication skills sufficient to explain the financial options available to members of varying backgrounds and economic situations, and to respond in writing to requests for information.

SPECIAL SELECTION FACTORS: Requires two (2) years of experience in a public contact area explaining eligibility and program benefits in accordance with legal standards and defined policy; OR an equivalent combination of education and experience.