

NORTH AMERICAN DIVISION

JOB OPPORTUNITY

Applications for the job listed below will be accepted from the time of posting from **NORTH AMERICAN DIVISION** employees **WITH AT LEAST ONE YEAR OF SERVICE IN THEIR CURRENT POSITIONS.**

TITLE OF JOB: Retirement Benefits Assistant

DEPARTMENT: Adventist Retirement Plan (NAD-RET)

SUPERVISOR: Assistant Administrator

REMUNERATION GRADE/RATE: Regular Full-Time (Non-exempt)

LOCATION: NAD Headquarters (Columbia, MD)

POSITION SUMMARY: Primary responsibilities involve performing duties with a high degree of precision and accuracy in a technical and time-sensitive work environment to process retirement applications for the Church and Hospital retirement plans, death transactions, Required Minimum Distributions (RMDs), checking card file, making/returning phone calls and attending meetings. Employee spends the majority of their work schedule collecting retirement application data, analyzing personal service records of retiring denominational employees, researching and interpreting retirement plan policies to determine eligibility, calculating Retirement Plan benefits, and subsequent follow-up for all retirement benefit inquiries/adjustments thereafter. Employee must be able to take initiative, utilizing analytical, technical, and interpretive skills to function well in this position.

AUTHORITY, ACCOUNTABILITY: Authority as delegated by the supervisor. Assignments are fairly routine and highly repetitive while being performed essentially independently. Problems, concerns, etc., are referred to the supervisor for help.

ESSENTIAL JOB FUNCTIONS:

- Processes multiple retirement applications in a deadline-driven environment for all DB (Defined Benefit) plans (church and hospital).
- Ensures retirement applications are processed within established timeframes by monitoring schedules and all outstanding questions/needs in order to complete the application on time. May include repeatedly following up on necessary/outstanding questions/items, utilizing a self-reminder/tickler system to track and ensure issues are resolved and questions are answered.
- Performs in-depth evaluation of service records using a step-by-step process while watching for sometimes subtle/minute details that could affect service credit calculations and overall eligibility for retirement benefits.
- Analyzes peripheral applicable data relating to DB policies, researches, interprets, and implements established policies, ultimately determining retiree benefits (monthly and peripheral or supplemental benefits).
- Primary contact with clients (retirees) to assist retiree and employing organizations (conferences and hospitals)—via personal interview, telephone, fax, and email/mail correspondence—with questions regarding retirement policies and benefits, having the ability to discuss technical details with a non-technical audience.
- Maintains the electronic data record of information regarding retirement or benefit related inquiries and works within the established methods of data entry and electronic records.
- Conducts extensive historical data research regarding retirement and benefit questions, disputes, etc., as needed.
- Initiates retirement applications from point of contact with plan participant of Boston Regional Medical Center (BRMC) and other 'closed' institutions, per established policies, including maintaining original Service Records for former employees. (Process includes initial creation of application documents, after evaluating and establishing eligibility, and ultimately determining retirement benefits and notifying retiree).
- Determines eligibility and initiates benefits for terminated vested individuals to comply with government Required Minimum Distribution regulations. May require researching and locating individuals, finding their correct contact information, and reaching out to them.

- Communicates with retirees and/or their spouse/families in the event of a death to discuss details such as final payments of death benefits, collecting on overpayments, etc. Must be able to be sensitive while also conveying policy information during such discussions.
- Works closely with payroll to ensure payments are correct and processed timely.
- Performs other duties as assigned by Supervisor.

EDUCATION/EXPERIENCE/CREDENTIALS: Bachelor's (BA/BS) degree in office administration or business-related field or certification from business college, including courses in word processing and computer literacy is preferred. Appropriate successful work experience may be acceptable in lieu of scholastic requirements.

A minimum of three to four years of relevant, progressive work experience, including accounting/bookkeeping, is required to gain the skills and knowledge required to perform job duties.

KNOWLEDGE AND SKILL: Well developed knowledge of principles, policies and beliefs of the General Conference, North American Division and the Seventh-day Adventist Church. Ability to maintain neatness and order, organization and a pleasant disposition in dealing with others. Requires knowledge of up-to-date office procedures such as data entry, filing, telephone techniques, office equipment (including the following computer skills—Microsoft Word and Microsoft Excel, Retirement Benefit Program, and Laserfiche). Clear English usage (spelling, grammar, punctuation, etc.). Must be able to read and accurately interpret technical policies and be able to adequately explain them to others. Must have the ability to work under pressure and with numerous interruptions. Position requires keyboard speed and accuracy. Absolute confidentiality required at all times; knowledge of church employment policies and practices helpful.

If interested in the above position, please submit cover letter, resume, and completed NAD Employment Application to jobs@nadadventist.org. Find the application on the NAD website at www.nadadventist.org/careers.

Position will remain available until filled.

Posted:

Thursday, November 10, 2022