

RETIREMENT CONSULTANT - PART-TIME - NON-BENEFITTED

JOB DESCRIPTION

Classification Responsibilities: A Retirement Consultant - Part-time is responsible for serving as a liaison for City employees regarding retirement. Duties include extensive public contact in providing employees with information regarding policies and statutes related to the Arizona State Retirement System (ASRS) and the Public Safety Personnel Retirement System (PSPRS); reviewing, interpreting, and explaining legislative changes affecting the Arizona retirement systems; and serving as a liaison between City employees and ASRS and PSPRS. Additional duties include attending meetings with retiring employees and surviving beneficiaries to obtain necessary information and explain available benefits and options; preparing written correspondence and emails to provide information to employees; assisting employees to calculate retirement eligibility and pensions; researching and computing benefit options; and computing previous service purchases and withdrawal of contributions. This class is also responsible for performing related duties as required.

Payroll Assignment: Duties include providing information to the employee that impacts their final payout; communicating with ASRS, PSPRS, and EORP via email and phone regarding service purchase agreements, verification of wages and status of termination, final wage reporting, and tracking of employer and employee retirement contributions; working with deferred compensation vendors; interpreting and explaining the City's Management Policies, Personnel Rules, time and leave considerations, and statutes as it relates to the employee's separation; calculating and presenting drafts of an employee's final paycheck, including salary, accrued leave hours, and payroll deductions; and ensuring compliance with federal and state income and tax reporting regulations, ASRS, PSPRS, and EORP.

Distinguishing Features: This classification has been designated as a non-classified, non-merit system; at-will position. Work involves independent decision making on problems encountered within a defined activity area. The employee plans and organizes the workflow utilizing departmental rules, regulations, and procedures. This class is supervised by the Human Resources Director or Payroll Administrator based on assignment. This class is FLSA nonexempt.

QUALIFICATIONS

Employee Values: All employees of the City of Mesa are expected to uphold and exhibit the City's shared employee values of Knowledge, Respect, and Integrity.

Minimum Qualifications Required. Any combination of training, education, and experience equivalent to graduation from an accredited college or university with an Associate's Degree with coursework in Human Resources, Business Administration, Public Administration, or a related field. Extensive (5+ years) of experience working with public sector retirement systems. Must possess a valid Class D Arizona Driver's License by hire date.

Special Requirements. None.

Substance Abuse Testing. None.

Desirable Qualifications. A Bachelor's Degree from an accredited college or university in Human Resources, Business Administration, Public Administration, or a related field. Experience working with ASRS and/or PSPRS retirement systems.

ESSENTIAL FUNCTIONS

Communication: Explains, answers questions, and provides information regarding retirement to employees in a clear and accurate manner. Answers questions and provides information to employees in person, by telephone, and in writing, in accordance with established departmental policies and regulations. Serves as liaison to ASRS and PSPRS. Prepares routine and specialized reports, memos, letters, and various other correspondence and documentation.

Manual/Physical: Uses personal computer (PC) software programs to compile and generate monthly and other periodic reports. Conducts presentations on retirement options. Calculates retirement, disability, survivor, and refund benefits, accounting for any previous service credits and/or costs with associated funds. Monitors and compares data to determine compliance with prescribed operating standards. Operates a motor vehicle requiring a standard Class D Arizona Driver's License to travel to various department locations to meet with employees for retirement consultation and to conduct seminars. Meets scheduling and attendance requirements.

Mental: Interprets applicable state statutes and Internal Revenue Service (IRS) regulations. Assists in verifying reports to ensure information is correct, researching data to prepare reports, and making recommendations based on information researched. Prioritizes work assignments. Comprehends and makes inferences from written material. Interprets complex policies, procedures, and laws related to the ASRS and PSPRS retirement systems.

Knowledge and Abilities:

Knowledge of:

business English, spelling, and grammar;
modern office practices, procedures, and equipment;
standard maintenance procedures applicable to personnel and benefits records (*by assignment*);
the methods and procedures applicable to various types of pre-employment testing (*by assignment*);
public administration and governmental organization;
personnel transactions and their uses (*by assignment*);
employee involvement programs;
PC software applications; and
the principles and practices of public personnel administration.

Ability to:

perform varied paraprofessional and clerical public contact and research work in support of assigned program area(s);
calculate final pay checks including accrued leave, deductions, (example: benefits, spousal support, tuition repayments, etc.) (*Payroll Assignment*);
utilize various PC software programs to assemble, prepare, and generate monthly reports;

compose routine letters and other correspondence;
read and understand oral and written objectives;
perform the duties of other Human Resources Specialist II positions as needed (*by assignment*);
perform work assignments independently; and
establish and maintain effective working relationships with management, other City employees, and the general public.

The duties listed above are intended only as general illustrations of the various types of work that may be performed. Specific statements of duties not included does not exclude them from the position if the work is similar, related, or a logical assignment to the position. Job descriptions are subject to change by the city as the needs of the city and requirements of the job change.

Revised 8/23

TC/js/co

CS5008.DOC

EEO-Para

JOB FCTN-ADM

INCREMENTS 43-200

PAY GRADE: 54

IND-9410

SWORN-No