

Job Description

Position: Sr. Benefit Specialist – Pension
Department: Client Services – Pension
Union: Represented position by Local 11

Position Description

A&I is seeking a highly motivated, organized individual to service and maintain client relationships. This position requires extensive knowledge of employee benefits and an expert in defined compensation and/or defined benefit pension & 401(k) administration. Responsible for delivering a wide range of services to Taft-Hartley accounts including, but not limited to: overall customer service, retirement application processing, pension verification and calculations, leading annual client renewal process, attending and taking minutes for internal and external meetings, general plan design services based on utilization and market data, plan document services, monthly analysis and reporting of client's plan performance, ongoing troubleshooting and problem solving for the client, and client relationship building. Performs advanced and complex, clerical duties requiring the use of independent judgment, analysis and detailed knowledge of company and/or department procedures related to work performed. Functions in a call center environment. The chosen candidate will also carry out and initiate additional tasks as needed for continual improvement of the Client Services department and the products and services that are delivered to our clients.

Skills Utilized:

- Overall customer service;
- Ability to analyze situations and make appropriate recommendations;
- Knowledge and application of benefit plan rules and providing retirement plan Services (Taft-Hartley experience a plus);
- General working knowledge of various industry vendors, their role in plan administration;
- Ability to participate in and lead team with implementation of new clients and renewal of existing clients;
- Ability to provide ongoing troubleshooting, problems solving and customer service;
- Facilitate governmental filings;
- Keyboarding (demonstrated ability to type quickly and accurately);
- Experience at intermediate level with MS office suite including in Word/Outlook/Excel;
- Excellent verbal, written, and phone communication skills;
- Intermediate level typing and 10-key abilities including accuracy;
- Good basic math skills including ability to calculate benefits;
- Maintaining complicated and detailed records and file organization paper/electronic);
- Proficient at handling and prioritizing multiple tasks;
- Ability to work independently and under general supervision;
- Contributes to a positive work environment by communicating in a professional and



Benefit Plan Administrators, Inc.

1220 SW Morrison Street, Suite 300
Portland, OR 97205

Phone 503.224.0048
Toll Free 1.800.547.4457
Fax 503.228.0149
www.aibpa.com

- positive manner (avoids negativity and gossip);
- Detail oriented, fast paced, flexible, team player;
- Ability to ask clarifying questions to complete tasks in the most efficient manner possible;
- Ability to frequently lift/move boxes with a weight of 30 lb or less;
- Ability to sit for long periods of time;
- Creating, improving and using administrative systems and procedural checklists; and
- Ability to follow policies, procedures and guidelines.

Required Qualifications

- 2-4 years experience in employee benefit plan administration;
- Minimum of 2 years pension experience including: Taft-Hartley defined benefit, defined contribution and 401(k) administration.

Preferred Qualifications

- 2 years of college or equivalent business school training.

Demonstrate the Attributes and Values Important to A&I

- Maintains confidentiality;
- Takes Initiative;
- Takes pride and ownership of work product;
- Reliable and is accountable for themselves and their work;
- Responsive and follows through;
- Work ethic (attitude and willingness to work and deliver timely and quality work);
- Demonstrates flexibility;
- Punctual including excellent attendance record;
- Integrity;
- Honesty;
- Respectful and courteous;
- Cooperative;
- Organized;
- Proven ability to prioritize work and multitask;
- Attention to detail/quality/accuracy;
- Solution oriented; and
- Excellent time management skills (able to prioritize and meet deadlines).

How to apply:

Interested parties please submit resume to aibpa@seemore.monster.com and reference #CSPSR

Cc: Local 11
1/14/2015

Small enough to know you. BIG ENOUGH TO SERVE YOU.

Since 1954