



## Retirement Specialist

**Job Code:** 7085

**Salary Grade:** S07

**FLSA Status:** Non-Exempt

*The following statements are designed to outline the general functions and typical responsibility levels associated with positions in this classification. They are not intended to serve as an exhaustive list of specific duties or requirements for individual positions assigned to this classification.*

### Duties and Responsibilities

Discusses retirement benefits with current University employees, retiring members, retirees, and beneficiaries.

- Provides counsel to employees on all retirement benefit policies, practices, programs and guidelines, to include but not limited to employees commencing a leave of absence or those employees at all levels of retirement planning.
- Communicates with members effectively regarding their benefits via phone, email, and in person.
- Researches, resolves, and explains retirement issues with employees or retirees.
- Calculates pension benefits and verifies accuracy of existing pension calculator tools. Ensures regulatory compliance in all aspects of calculation, communication, and documentation.
- Performs various clerical duties requiring the use of independent judgment and analysis.
- Resolves routine employee/vendor benefits issues in a timely manner.
- May calculate retiree and vested terminated pension benefits as required and sends certificates detailing the calculation to the employee.
- Performs various duties as needed to successfully fulfill the function of the position.

### Minimum Qualifications

**Education:**

Required: Required: High School diploma or GED.

**Experience:**

Required: 12 months experience in Human Resources, Retirement benefits or related field.

**Certifications or Licenses:**

- None

**Verification of education and licensure (if applicable) will be required if selected for hire.**

### Knowledge, Skills, and Abilities

- Ability to conduct employee presentations
- Ability to communicate verbally and in writing and build rapport with students, faculty and staff
- Excellent organizational skills
- Ability to compute payroll deductions and payroll adjustments for benefits
- Ability to apply basic math skills.
- Knowledge of Federal and State tax laws and University policies
- Ability to collect and analyze data
- Basic problem solving techniques
- Working knowledge of Microsoft Office (Word, Outlook, and Excel)
- Detail oriented for accuracy of data and information
- Ability to handle multiple projects and deadlines

### Working Conditions

**Physical:**

Sit for prolonged periods. Use of a computer, calculator, and telephone. Ability to engage in repetitive motions. Communicate effectively and listen.

**Environmental:**

Standard Office Environment. Frequent exposure to pressure caused by deadlines and busy periods. Requires contact with Staff, Faculty, Students, other departments and University officials.

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