JOB DESCRIPTION
The UNIVERSITY of OKLAHOMA

Retirement Specialist Lead

Job Code: 8332

Salary Grade: S09

FLSA Status: 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

Responsible for the campus administration of retirement benefits for current University faculty and staff, prospective retirees, retirees, and beneficiaries.

- Provides lead-level support and direction to Retirement Specialists and support staff, including workload coordination, training, mentoring, and resolution of complex issues.
- Serves as the primary escalation point for complex retirement cases, including retirement eligibility determinations, retirement plan options, and post-retirement benefits.
- Reviews retirement transactions, documentation, and records for accuracy, completeness, and compliance with established procedures.
- Coordinates retirement counseling services, including individual consultations, retirement planning sessions, and employee education workshops.
- Analyzes reports to identify, investigate, and resolve retirement and benefits-related issues.
- Completes retiree subsidy billing for all campuses, ensuring the University receives maximum available reimbursement to support retiree benefits.
- Administers bi-weekly retirement-related payroll processes, including auditing benefit plan enrollments and monitoring 403(b) and 457(b) contribution limits for employees receiving both University and Professional Practice Plan (PPP) compensation, as applicable.
- Processes and reconciles retirement contribution files after each payroll, resolving errors to ensure accurate posting to employee retirement accounts.
- Processes forfeitures for terminated, non-vested retirement plan participants.
- Performs various duties as needed to successfully fulfill the function of the position

Minimum Qualifications

Education:

Bachelor's degree

Equivalency/Substitution: Experience or a combination of education & related experience can be considered in lieu of degree. A one-to-one ratio is used to determine the number of years of experience required in place of a degree.

Experience:

- 3 years of experience in benefits administration, retirement administration, human resources, or a related field

Certifications or Licenses:

None

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

Knowledge, Skills, and Abilities

- Knowledge of employee benefits and retirement programs, including applicable policies, procedures, compliance requirements, and best practices.
- Strong verbal, written, and interpersonal communication skills, including the ability to deliver presentations and provide exceptional customer service to faculty, staff, retirees, and external partners.
- Ability to collect, analyze, and interpret data; perform calculations and audits; identify issues; and implement appropriate solutions.
- Ability to maintain confidentiality and exercise sound judgment when making administrative and procedural decisions involving sensitive information.
- Strong organizational, time management, and prioritization skills, with the ability to manage multiple assignments and meet deadlines while maintaining a high level of accuracy and attention to detail.
- Proficiency in Microsoft Office Suite, including Word, Excel, and Outlook.

Working Conditions

- Sit for prolonged periods. Use of a computer, calculator, and telephone.

- Ability to engage in repetitive motions.
- Communicate effectively and listen.
- Standard Office Environment.
- Frequent exposure to pressure caused by deadlines and busy periods.
- Requires contact with employees, retirees, other departments, and University officials

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