Job Description Summary – Senior Benefits Analyst for CSAA IG Retirement Programs

The Senior Retirement Benefits Analyst position will have the opportunity to contribute to a wide variety of complex activities involving the management of retirement benefit plans and programs. Using analytical, organization and communication skills, this position is responsible for providing subject matter expertise on administration, compliance, vendor management, reporting, as well as employee communication and education for qualified and non-qualified retirement and retiree medical programs. The position will also conduct research and data analysis regarding various aspects of the plans, identify and develop process improvements, and implement programs accordingly. The successful candidate should have the ability to multi-task assignments, projects and daily responsibilities with accuracy and high level of comfort working with all levels of employees. He/she should also possess strong analytical and both written & verbal communication skills.

Job Responsibilities

• **Administration:** Responsible for the day-to-day administration and operation of the retirement plans, including contribution/funding reconciliation, distributions, QDRO processing, benefit file coordination and maintenance; analyze, address and implement 401(k)/Pension plan design changes; comprehensive understanding of benefits administration for Executive Retirement Plans

• **Compliance:** Monitor and ensure the legal compliance of the plans, by working with providers, internal and external legal counsel; manage the 401(k) and Pension Plan annual audit, 5500 process and compliance testing (Non-Discrimination); read, review and apply legislative changes affecting the retirement programs

• **Vendor Management:** Manage the relationships between company, employee, trustee and vendor, as applicable, regarding the retirement plans, plan systems, pension calculations and service valuation; coordinate and assist vendor/trustee with payments for employees as part of retirement process and/or termination process

• **Plan Reporting:** Responsible for providing financial metrics and cost analysis of the retirement plans; collect, verify and provide retirement data to the fund’s actuary as needed for computation of benefits, funding requirements, valuations and applicable internal audits; collaborate with accounting and financial reporting to ensure appropriate measurement and reporting of plan assets, liabilities, and funding levels

• **Communications/Education:** Prepare and/or supervise the draft and delivery of appropriate educational communications regarding the retirement plans, opportunities and eligibility criteria as needed for company 401(k), pension plans, retiree medical plans, and Executive retirement plans; prepare communications and materials necessary to address recommended changes and key issues to the Retirement Plan Committee; interpret and explain policies, procedures, and relevant law to current, terminated and retired employees.

• **Health & Welfare Support:** Serve as back up to the Health & Welfare Benefits Analyst; assist with department needs, such as Annual Enrollment, compliance testing, plan audits; assists with the development of policies and procedures; consult with employees regarding Health & Welfare Benefits-related issues, needs, and services; assist in counseling employees on Benefits programs, policies and processes; explain program provisions, procedures and eligibility requirements; troubleshoot discrepancies pertaining to the manner in which benefit/retirement plans are administered, etc.

Desired Skills & Experience

• Bachelor’s degree or equivalent work experience

• CEBS certification or classes in retirement plans preferred

• Minimum of 5-7 years of Defined Benefit and Defined Contribution Plan administration experience

• Knowledge of federal and state benefit and tax legislation required

• Strong knowledge of benefit laws and regulations, including ERISA, HIPAA, FMLA, COBRA and ACA.

• Customer-centric, organized and detail-oriented with strong MS Office Excel skills

• Understanding of Workday and Fidelity administration portal desired