



RETIREMENT MANAGER

Purpose Statement

Under general supervision, conducts retirement presentations and other presentations as needed, meets with employees that are eligible to retire, performs various mathematical calculations, provides accounting services, completes reports and enters information into Concord and Munis, and tax shelters, answers the telephone, provides information and/or take messages.

This job reports to the Assistant Superintendent of Human Resources.

Essential Functions

- Meets one on one with employees and others to complete retirement paperwork.
- Prepares and presents retirement and informational meetings to large groups of individuals in a group setting.
- Schedules outside agencies to assist in employee education.
- Figures retirement and insures compliance with all IRS regulations and other applicable laws.
- Manages monthly employee deduction reporting to retirement providers (TCRS, Empower, Lincoln, etc.).
- Keys employee payroll deductions into HRIS (Munis).
- Completes bi-annual teacher reporting through TNCompass.
- Must be able to figure payroll, perform basic accounting duties, calculate wages and calculate sick leave time.
- Must be able to conduct new employee orientation and/or employee benefit meetings outside of normal business hours.
- Establishes and maintains satisfactory, respectful, working relationships within the school environment.
- Performs other duties as assigned.

Technical Skills & Abilities

- Knowledge of qualified and non-qualified retirement/deferred compensation plans, administrative services and measurement tools.
- Knowledge of benefits regulatory/compliance environment.
- Advanced knowledge of MS Excel.
- Intermediate knowledge other MS applications, Word, Outlook, PowerPoint.
- Excellent interpersonal skills; strong oral and written communication skills.
- Ability to prioritize and handle multiple tasks in a demanding work environment.
- Able to identify and analyze data, discern trends, and draw relevant conclusions.
- Critical thinking and strong analytical capabilities.
- Strong attention to detail.
- Able to simply illustrate technical concepts and create reports that can be clearly interpreted by non-technical users.

Other Functions

- Performs other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.



Williamson County Schools

RIGOR • RELEVANCE • RELATIONSHIPS • RELENTLESSNESS

Job Requirements: Minimum Qualifications

Skills, Knowledge and Abilities

SKILLS

Specific skill-based competencies required to satisfactorily perform the functions of the job include: planning and managing projects; using pertinent software applications; preparing and maintaining accurate records; and administering personnel policies.

KNOWLEDGE

Specific knowledge-based competencies required to satisfactorily perform the functions of the job include: pertinent codes, policies, regulations and/or laws; conflict resolution; and concepts of management and supervision.

ABILITY

Specific ability-based competencies required to satisfactorily perform the functions of the job include: communicating with diverse groups; maintaining confidentiality; setting priorities; working as part of a team; working with frequent interruptions; motivating staff; and adapting to changing work priorities.

Responsibility

Responsibilities include: working independently under broad organizational guidelines to achieve unit objectives; leading, guiding, and/or coordinating others. Utilization of some resources from other work units is often required to perform the job's functions. There is some opportunity to significantly impact the organization's services.

Working Environment

The usual and customary methods of performing the job's functions require the following physical demands: occasional lifting, carrying, pushing, and/or pulling; some stooping, kneeling, crouching, and/or crawling; and significant fine finger dexterity. Generally, the job requires 60% sitting, 10% walking, and 30% standing. The job is performed in a generally hazard free environment and in a clean atmosphere.

EXPERIENCE: Job related experience within specialized field is required.

EDUCATION: Bachelor's degree.

EQUIVALENCY: None specified.

REQUIRED TESTING:

None Specified

CERTIFICATES & LICENSES:

None Specified

FLSA STATUS:

Exempt

CONTINUING EDUCATION/TRAINING:

None Specified

CLERANCES:

Criminal Justice Fingerprint/Background Clearance

SALARY GRADE:

Classified

Pursuant to the Williamson County Board of Education's policy of equal opportunity employment, Williamson County Schools does not discriminate on the basis of race, color, religion, age, sex, national origin, disability status, genetic information, pregnancy, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state, or local laws.