

IOWA DEPARTMENT OF ADMINISTRATIVE SERVICES ▼  
HUMAN RESOURCES ENTERPRISE  
RETIREMENT BENEFITS OFFICER

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**DEFINITION**

Performs pre and post retirement counseling with members and dependents on a local basis; determines individual retirement benefit amounts; adjusts benefit amounts based on corrected information; performs related work as required.

**The Work Examples and Competencies listed are for illustrative purposes only and not intended to be the primary basis for position classification decisions.**

**WORK EXAMPLES**

Applies knowledge of specialized subject matter and techniques utilized in the development and maintenance of the public retirement programs in benefits administration; compensation; appeals; responds to requests from members, retirees, beneficiaries and contingent annuitants concerning retirement, death benefits, refunds and referrals.

Estimates IPERS benefits payable to members planning retirement from covered employment; analyzes members' accounts by applying current laws, rules, and regulations to ensure all members receive their maximum retirement benefit.

Conducts one-on-one counseling sessions either in person, via internet, or via the phone in order to explain possible benefits payable under each of the different retirement options: refund possibilities versus monthly benefits, and refund or monthly benefits offered for the retiring person's beneficiary or contingent annuitant; examines all correspondence leading to the application of benefits, determines through mathematical calculations, rate tables, and options elected, answers questions regarding the earnings limitations after retirement, taxability of the benefit, when warrants are issued; explains current and proposed amendments to the IPERS or Peace Officer Retirement law; prepares applications for monthly benefits and records the designation of beneficiary, age proofs, and prior service proofs, if applicable.

Adjusts benefits amounts due to earnings that were not reported at the time of original determination of the monthly benefits, a corrected report of earnings, additional prior service proof, a corrected date of termination of employment reported by the employer, or a corrected age proof submitted by the retired member.

Evaluates and modifies retirement benefits operations; devises method and procedures; interprets laws, rules, and policies relating to preretirement and retirement services; assists with retirement planning.

Assures quality service to customer groups by achieving a quality measure regarding outcomes, such as customer satisfaction, accuracy, and timely information.

**COMPETENCIES REQUIRED**

Knowledge of the principles and practices of public retirement administration.

Knowledge of general principles of economics and their relationship to public employee retirement systems, federal social security program, and Internal Revenue Service regulations.

Knowledge of interviewing techniques, practices, and principles.

Knowledge of federal, Internal Revenue Service, and state laws and the Iowa code affecting the Iowa Public Employees Retirement System.

Knowledge of social and economic problems affecting persons of retirement age.

Ability to interpret and apply pertinent federal and state laws, rules, policies, and procedures relating to preretirement services, refunds, disability compensation, and death benefits.

Ability to manually compute all computations normally performed through computer processing.

Ability to collect, analyze and report retirement related data.

Ability to analyze critical issues, form opinions, and make recommendations with varying time frames.

Displays high standards of ethical conduct. Refrains from dishonest behavior.

Works and communicates with all clients and customers providing polite, quality professional service.

Displays a high level of initiative, effort, attention to detail and commitment by completing assignments efficiently with minimal supervision.

Follows policy, cooperates with supervisors and aligns behavior with the goals of the organization.

Fosters and facilitates cooperation, pride, trust, group identity and team spirit throughout the organization.

Exchanges information with individuals or groups effectively by listening and responding appropriately.

### **EDUCATION, EXPERIENCE, AND SPECIAL REQUIREMENTS**

Graduation from an accredited college or university with a Bachelor's Degree;

OR

one year of full-time experience in job interviewing referral and/or placement, credit investigation, collection work or related public contact work obtaining, analyzing and/or evaluating data may be substituted for each 30 semester hours of the required education to a maximum substitution of four years;

OR

employees with current continuous experience in the state executive branch that includes the equivalent of two years of full-time work as a Retirement Benefits Technician.

Effective Date: 04/10 VA