

IOWA DEPARTMENT OF ADMINISTRATIVE SERVICES ▼
HUMAN RESOURCES ENTERPRISE
PENSION SYSTEM ATTORNEY

DEFINITION

Provides legal counsel regarding complex benefit matters as an attorney for the Iowa Public Employees Retirement System (IPERS); 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

Provides legal advice to the Chief Executive Officer, Managers and Investment Board, IPERS members, retirees, their spouses or former spouses, and beneficiaries and their representatives or attorneys regarding complex legal matters that focus primarily in the areas of pension law, administrative law, state and federal employee benefit law, probate law, trust and estate law, family law, contract law, and disability law.

Maintains a professional working knowledge of all pertinent federal and state laws, administrative rules and regulations, court rulings, and IPERS policies and procedures which affect IPERS, to ensure correct interpretation and uniform implementation of the law.

Maintains the tax qualified status of IPERS Trust Fund by acquiring plan qualification letters and private letter rulings from the Internal Revenue Service at regular intervals; resolves issues identified by the Internal Revenue Service.

Advises staff concerning applicable laws and rules with respect to distribution of benefits, and services to IPERS members, beneficiaries, and alternate payees; the appropriate tax treatment of distributions; plan qualification requirements and other tax issues; fiduciary responsibility issues; and, the release of confidential information.

Reviews court orders, Qualified Domestic Relations Orders (QDRO), child support orders, wage withholding orders, and tax levies, and advises IPERS staff regarding compliance or implementation of legal orders and assists members and their representatives regarding the IPERS law and QDRO process, reviews and directs the implementation of Qualified Domestic Relations Orders on members accounts; legal documents provided by IPERS members or their representatives, such as Powers of Attorney, Letters of Guardianship, Trust Agreements, and Decrees of Divorce, to determine sufficiency of authority or award of IPERS benefits, and probate documents to determine appropriate payment of death benefits.

Conducts research, analyzes legal issues and prepares legal memoranda; reviews evidence and prepares discovery responses and affidavits in support of defense or prosecution of litigation; renders decisions on the points of law or construction of an act; directs corrective action, payment or relief as provided under the law or regulations.

Prepares and reviews Request for Proposals, contracts, memoranda, briefs, administrative rules, policies, business rules, pleadings, correspondence, and other materials.

Represents IPERS at civil and administrative hearings; meetings/negotiations with consultants, Legislature, advisors, Investment Board, constituent groups, vendors, governmental agencies, outside counsel, Iowa Attorney General's Office, IPERS members, the general public, and in collective bargaining and other union activities.

Assists Operations Unit in its management of the Headquarters building, by preparing and negotiating property management contracts, ensuring compliance with all building covenants, and other issues that arise with owning the IPERS headquarters building.

Assists Investments Unit in its management of investments of the Trust Fund assets by advising on contractual obligations, requests for proposals, Investment Board issues, Internal Revenue Code requirements, requests for public records and securities law.

COMPETENCIES REQUIRED

Knowledge and understanding of relevant areas of law or practice, including complex employee benefit, insurance, qualified public pension plan, tax, federal and state securities law; probate, disability, family and domestic relations laws, administrative law, open government statutes and legal interpretations; commercial and financial transactions; defending government entities; fiduciary responsibilities; trust concepts; and ethics issues.

Knowledge of the principles of administrative and constitutional law and of trial and hearing procedures, rules of evidence and appellate procedure.

Knowledge of effective written and verbal communication skills, including preparing and delivering complex legal documents, reports and presentations, and in reducing the essential content of such documents/presentations to material that is meaningful to non-attorneys.

Ability to quickly acquire and apply an understanding of IPERS laws and rules and related state and federal laws and regulations affecting assigned areas.

Ability to perform difficult legal research and analysis of documents and fact situations, and to render advice, recommendations and decisions based on sound legal judgement.

Ability to articulate challenges, possible solutions, and pros and cons of available options under governing laws, rules, and other requirements.

Ability to establish and maintain harmonious working relationships with co-workers, agency staff, members and external contacts, and to work effectively in a professional team environment.

Ability to work extended/irregular hours and travel as needed due to internal and external obligations.

Ability to use a personal computer with multiple applications and software.

Displays high standards of ethical conduct. Exhibits honesty and integrity. Refrains from theft-related, dishonest or unethical behavior.

Works and communicates with internal and external clients and customers to meet their needs in a polite, courteous, and cooperative manner. Committed to quality service.

Displays a high level of initiative, effort and commitment towards completing assignments efficiently. Works with minimal supervision. Demonstrates responsible behavior and attention to detail.

Responds appropriately to supervision. Makes an effort to follow policy and cooperate with supervisors.

Aligns behavior with the needs, priorities and goals of the organization.

Encourages and facilitates cooperation, pride, trust, and group identity. Fosters commitment and team spirit.

Expresses information to individuals or groups effectively, taking into account the audience and nature of the information. Listens to others and responds appropriately.

EDUCATION, EXPERIENCE, AND SPECIAL REQUIREMENTS

Graduation from an accredited law school and experience equal to six years of full-time work in the practice of law;

OR

graduation from an accredited law school and experience equal to three years of full-time work as a pension attorney.

NECESSARY SPECIAL REQUIREMENTS

Admission to practice law before the Supreme Court of Iowa.

Effective Date: 11/04 JG