Iowa Department of Administrative Services – Division of Human Resources
Job Classification Description

Pension System Attorney

Definition
Supervises staff in the provision of legal counsel regarding complex benefit matters for the Iowa Public Employees Retirement System (IPERS); performs related work as required.

The work examples and competencies listed below are for illustrative purposes only and not intended to be the primary basis for position classification decisions.

Work Examples
Supervises and evaluates the work of subordinates; recommends personnel actions related to selection, disciplinary procedures, performance, leaves, grievances, work schedules and assignments; administers personnel policies and procedures.

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.
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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:

- Administration and Management – Business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources.
- Personnel and Human Resources – Principles and procedures for personnel recruitment, selection, training, compensation and benefits, labor relations and negotiation, and personnel information systems.
- English Language – The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.

Abilities:

- Law and Government – Understand and adhere to applicable laws, legal codes, administrative rules, and regulations.
- Clerical – Maintain complex clerical records.
- Written Expression – Communicate information and ideas in writing so others will understand.
- Speech Clarity – Speak clearly so others can understand.
- Speech Recognition – Identify and understand the speech of another person.
- Deductive Reasoning – Apply general rules to specific problems to produce answers that make sense.
- Inductive Reasoning – Combine pieces of information to form general rules or conclusions.
- Problem Sensitivity – Tell when something is wrong or is likely to go wrong. It does not involve solving the problem, only recognizing there is a problem.
Skills:
- Active Listening – Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
- Critical Thinking – Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- Reading Comprehension – Understanding written sentences and paragraphs in work related documents.
- Speaking – Talking to others to convey information effectively.
- Writing – Communicating effectively in writing as appropriate for the needs of the audience.
- Negotiation – Bringing others together and trying to reconcile differences.
- Active Learning – Understanding the implications of new information for both current and future problem-solving and decision-making.
- Judgment and Decision Making – Considering the relative costs and benefits of potential actions to choose the most appropriate one.
- Service Orientation – Actively looking for ways to help people.
- Complex Problem Solving – Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.

Minimum Qualification Requirements
Applicants must meet at least one of the following minimum requirements to qualify for positions in this job classification:

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

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

Notes
Positions in this class require admission to the Iowa State Bar.

Effective date: 02/21 KMJ