| Job Title: Retirement Counselor | Department: Benefits |
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| Reports to: Benefits Supervisor | Effective Date: November 29, 2022 |

## Job Summary:

The Dallas Police & Fire Pension System is seeking a Retirement Counselor to assist members with a variety of retirement services. In this role, the individual would be responsible for member interactions related to all aspects of administering retirement, disability, and survivor benefits and counseling members and their beneficiaries regarding their pension benefits. Work is performed under limited supervision with moderate latitude for the use of initiative and independent judgment.

## Duties/Responsibilities:

- Provide consultative services to members, qualified survivors, and beneficiaries in person or by phone.
- Counseling and processing retirements, DROP, terminations, disabilities, hardships, military buybacks, death/survivor benefits, estate payments, and the full spectrum of other applicable events.
- Explains pension plan policies, procedures, and legal requirements to members.
- Computes retirement and benefits-related calculations and analysis including the repurchase of service credit and withdrawal of contributions.
- Reconcile member accounts for accuracy and performs research to resolve issues.
- Conducts group presentations to educate members regarding pension system benefits.
- Performs other related duties as assigned.

## Required Skills/Abilities:

- Integrity, discretion, and respect for confidential information.
- Organizational, time management, and multitasking skills required.
- Follows through on commitments; is reliable, conscientious, and dependable.
- Extremely detailed oriented.
- Strong organizational and project management skills, including the ability to plan, prioritize and execute multiple initiatives/deadlines autonomously and shift priorities as necessary. Able to manage projects. Uses time effectively.
- Excellent communication (verbal and written), interpersonal and professional interactive skills are necessary to perform at a high degree of proficiency.
- Capable of working with internal staff from other departments in a proactive and constructive manner.
- Ability to understand and execute all relevant policies and procedures in a consistent, timely and objective manner. Strong analytical and problem-solving skills.
- Proficient with Microsoft Windows operating systems or related software.
- Adaptive to daily demands and adjust priorities as directed by management.

## Education and Experience:

- Requires a bachelor's degree or its equivalent.
- Three years of related experience preferred.

## Supervisory Responsibilities:

- None

## Work Environment:

- This is a full-time 40-hour-per-week exempt role with standard hours from 08:00 AM to 05:00 PM Monday - Friday at DPFP's office. (4100 Harry Hines Blvd. Ste. 100 Dallas, TX 75219)
- Prolonged periods of sitting at a desk and working on a computer.

## Salary and Benefits:

Salary will be commensurate with education and experience. Our benefits package includes retirement plans (Texas Municipal Retirement System cash balance defined benefit plan and 457 deferred compensation plan administered by Voya), health, dental, vision, life, short- and long-term disability insurance, long-term care, health savings account, flexible spending accounts, health reimbursement account, paid vacation, holidays, sick time, and free parking.

*Interested parties should email their resume to [resume@dpfp.org](mailto:resume@dpfp.org). Please include "Retirement Counselor" in the subject line.*

*The Dallas Police & Fire Pension System provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.*

*This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation, and training.*