



PALM BAY POLICE & FIREFIGHTER'S PENSION FUND

JOB TITLE: PENSION ASSISTANT

GENERAL STATEMENT OF THE JOB

Part time position reporting to the Palm Bay Police & Firefighters' Board of Trustees performing a variety of administrative duties. Work involves providing receptionist duties, screening and independently answering telephones and taking messages, opening and distributing mail, making copies of various documents, forms, and member packets, usage of the PensionGold, or any applicable software program. Coordinates in-office handyman services, prepares routine invoices for submission to the custodial bank for remittance, conducts new member orientation sessions, type warrants, assist with hurricane preparedness, composing and typing a variety of documents, schedule and attend meetings upon request, maintain calendars, assist with member and vendor mailings, knowledgeable of all pension and public records law statutes, pension ordinances, pension-related IRS guidelines, and Plan provisions, performing highly responsible, professional work in executing decisions of the Board of Trustees.

SPECIFIC DUTIES AND RESPONSIBILITIES

ESSENTIAL JOB FUNCTIONS

Types correspondence, reports, contracts, memos, forms, and other material into form from typed or handwritten copy, assuming responsibility for spelling, punctuation, grammar, and format; proofreads various forms and documents, ensuring proper content, spelling, punctuation, grammar, and format. May compose basic correspondence for the Board of Trustees. May copy materials and manuals.

Answers telephone and receive inquiries, providing information to the general public concerning Board activities, or referring callers to appropriate trustee(s) or agencies, as necessary; records and routes messages to appropriate area, as necessary. Receives, opens, and distributes mail and faxes.

Files and retrieves materials; prepares photocopies of various materials and distributes as requested or otherwise appropriate. Maintains member files and verifies for completeness. Maintains and prints emails and correspondence for archive in accordance with public records and pension retention laws.

PENSION ASSISTANT

Processes the documentation for the Board custodian, accountant, auditor for the annual independent audit, attorney, actuary, and for the annual report to the Division of Retirement, Actuarial Valuation Reports, impact studies & statements, beneficiary changes for active and retired Plan members, employee benefit statements, processes Plan retirement applications, Deferred Retirement Option Program (DROP) payments, Cost-of-Living Allowances (COLA), buy-back of prior service and reporting, annual retiree and disability affidavits, and in researching and preparing disability, forfeiture, and death claims, member notices, spreadsheets, upgrades as needed for new employee benefits and enhancements.

Prepares warrants for retirees, educational, and special invoices for submission to the custodial bank for remittance and coordinates documentation with the Board accountant. Prepares the Letter of Direction list of recurring warrants for the accountant and custodial bank, and warrants for purchases or updates to existing routine warrants for Board signature and associated reports for office staff. Communicates and interacts with service providers, as directed by the Board. Submits warrants and invoices to accountant and custodial bank for processing.

ADDITIONAL JOB FUNCTIONS

Performs other related work as required.

The listed duties are only illustrative and are not intended to describe every function that may be performed by this job class. The omission of specific statements does not preclude Board members from assigning specific duties not listed if such duties are a logical assignment to the position.

MINIMUM TRAINING AND EXPERIENCE

Graduation from an accredited College or University with a Bachelor's degree or high school diploma, supplemented by four (4) years of direct experience. With experience in bookkeeping, financial, accounting, administration or management work; and use of computer driven word processing, spreadsheet, and file management programs, or any equivalent combination of training and experience that provides the required knowledge, skills and abilities. Ability to operate standard office equipment. Computer skills to include experience with MS Word, Excel, Databases, Power Point, or similar programs. Ability to work on the Internet and familiar with web-based programs. Typing speed: 35 WPM. Must possess a valid Florida's Driver's License and have an acceptable driving record and maintain an acceptable driving record. Must obtain the Certified Public Pension Trustees' (CPPT) certification through the Florida Public Pension Trustees' Association (FPPTA) and maintain CEUS within the training policy.

PENSION ASSISTANT

MINIMUM QUALIFICATIONS OR STANDARDS REQUIRED

TO PERFORM ESSENTIAL JOB FUNCTIONS

Physical Requirements: Must be physically able to operate a variety of automated office machines including computers, telephone, copiers, facsimile machines, printers, calculators, postal equipment, etc. Must be able to exert a negligible amount of force frequently or constantly to lift, carry, push, pull, climb, bend, kneel, reach, or otherwise move objects. Sedentary work involves sitting most of the time, but may involve walking or standing for brief periods of time. Jobs are sedentary if walking and standing with some bending kneeling, reaching, lifting required only occasionally and all other sedentary criteria are met.

Data Conception: Requires the ability to compare and/or judge the readily observable, functional, structural, or composite characteristics (whether similar to or divergent from obvious standards) of data, people, or things.

Interpersonal Communications: Requires the ability to speak and/or signal people to convey or exchange information. Includes receiving instructions, assignments and/or directions from the Board of Trustees. Good interpersonal abilities with the ability to get along and interface with diverse personalities and professional disciplines. Ability to communicate with all age groups.

Language Ability: Requires the ability to read a variety of correspondence, reports, forms, manuals, etc. Requires the ability to prepare correspondence, reports, forms, meeting agendas, etc., using prescribed formats and conforming to all rules of punctuation, grammar, diction, and style. Requires the ability to speak to people with poise, voice control and confidence.

Intelligence: Requires the ability to apply rational systems to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists; to interpret a variety of instructions furnished in written, oral, diagrammatic, or schedule form.

Verbal Aptitude: Requires the ability to record and deliver information, to explain procedures, to follow oral and written instructions. Must be able to communicate effectively and efficiently in Standard English.

Numerical Aptitude: Requires the ability to utilize mathematical formulas; to add and subtract totals; to multiply and divide; to determine percentages and decimals.

Form/Spatial Aptitude: Requires the ability to inspect items for proper length, width, and shape.

PENSION ASSISTANT

Motor Coordination: Requires the ability to coordinate hands and eyes rapidly and accurately in using automated office equipment.

Manual Dexterity: Requires the ability to handle a variety of items such as office equipment. Must have minimal levels of eye/hand/foot coordination.

Color Discrimination: Does require the ability to differentiate between colors on files, forms, and color copying.

Interpersonal Temperament: Requires the ability to deal with people beyond giving and receiving instructions. Must be adaptable to perform under stress and when confronted with persons acting under stress. High energy level, comfortable performing multi-faceted projects in conjunction with day-to-day activities.

Physical Communication: Requires the ability to talk and/or hear: (talking; expressing or exchanging ideas by means of spoken words; hearing perceiving nature of sounds by ear). Must be able to see, read, handle or feel objects and controls. Must be able to communicate via telephone.

PERFORMANCE INDICATORS

Knowledge of Job: Has considerable knowledge of the Plan and Board rules, regulations, policies and procedures, and the ability to interpret them. Has considerable knowledge of the organization and functions of the Plan. Has considerable knowledge of modern office practices and procedures. Has considerable knowledge of arithmetic, spelling, grammar, punctuation, and vocabulary. Is skilled in the operation of common office equipment, including popular computer-driven word processing, spreadsheet, and file maintenance programs. Is able to research program documents and narrative materials, and to compile reports from information gathered. Is able to make routine administrative decisions independently in accordance with laws, regulations and Board policies and procedures, and to solve problems and answer questions. Is able to maintain confidentiality of active and retired member information. Is able to develop and modify work procedures, methods, and processes to improve efficiency. Is able to communicate effectively orally and in writing. Is able to establish and maintain effective working relationships as necessitated by work assignments.

Quality of Work: Maintains high standards of accuracy in exercising duties and responsibilities. Exercises immediate remedial action to correct and quality deficiencies that occur in areas of responsibility. Maintains high quality communication and interacts with the Board of Trustees, vendors, and the general public. Ability to work independently and collaboratively. Ability to work with detailed technical information and actuarial and legal terminology.

PENSION ASSISTANT

Quantity of Work: Maintains effective and efficient output of all duties and responsibilities as described under “Specific Duties and Responsibilities”

Dependability: Assumes responsibility for doing assigned work and meeting deadlines. Completes assigned work on or before deadlines in accordance with directives, standards, and prescribed procedures. Accepts accountability for meeting assigned responsibilities in the technical, human, and conceptual areas. Results, service, detail and people-oriented. Ability to be diplomatic and meet deadlines. Demonstrate a high level of integrity and loyalty to the interests of the Pension Fund.

Attendance: Attends work regularly and adheres to Board policies and procedures regarding absences and tardiness. Provides adequate notice to the Board with respect to work scheduling.

Initiative and Enthusiasm: Maintains an enthusiastic, self-reliant, and self-starting approach to meet job responsibilities and accountability. Strives to anticipate work to be done and initiates proper acceptable direction for completion of work with a minimum of supervision and instruction.

Judgment: Exercises analytical judgment in areas of responsibility. Identifies problems or situations as they occur and specifies decision objectives. Identifies or assists in identifying alternative solutions to problems or situations. Implements decisions in accordance with prescribed and effective policies and procedures and with a minimum of errors. Seeks expert or experienced advice and researches problems, situations, and alternatives before exercising judgment.

Cooperation: Accepts Board instruction and direction and strives to meet the goals and objectives of same. Questions such instruction and direction when clarification of results or consequences are justified, i.e., poor communications, variance with Board procedures, etc. Offers suggestions and recommendations to encourage and improve cooperation between all staff persons within the office.

Relationships with Others: Shares knowledge with the Board for mutual benefit. Contributes to maintaining high morale. Develops and maintains cooperative and courteous relationships with the Board, Plan members and representatives from other organizations, and the general public so as to maintain good will and project a good Board image. Tactfully and effectively handles requests, suggestions and complaints from the Board and Plan members in order to maintain goodwill within the Plan. Interacts effectively with the Board, Plan members, service providers and the general public.

Coordination of Work: Plans and organizes daily work routine. Establishes priorities for the completion of work in accordance with sound time management methodology. Avoids duplication of effort. Estimates expected completion time of elements of work and

PENSION ASSISTANT

establishes a personal schedule accordingly. Attends meetings, planning sessions and discussions on time. Implements work activity in accordance with priorities and estimated schedules. Maintains a calendar for meetings, deadlines, and events.

Safety and Housekeeping: Adheres to all safety and housekeeping standards established by the Board and government regulatory agencies. Sees that the standards are not violated. Maintains a clean and orderly workplace.

APPROVED-JOBDESCRPENSIONASSISTANT Revised 3/7/2025