



**JOB DESCRIPTION: Retirement ANALYST**

**Summary:**

This position is responsible for supporting consultants and actuaries by completing client projects and valuations, and by participating in any presentations and communication of client projects.

**Responsibilities:**

- Work closely with Retirement actuaries and consultants to assist with client projects.
- Responsible for the timely and accurate collection, entry, verification and management of data to be used for actuarial processing; prepare annual asset reconciliations.
- Participate in client service planning meetings; prepare initial drafts of actuarial reports for review, including remarks; prepare communication materials for transmitting reports.
- Carry out required work involved in the documentation and proper government filing of client materials (Form 5500, PBGC, 8955-SSA, etc.).
- Prepare and check individual employee pension statements and individual benefit calculations.
- Assist with monitoring and staff reporting of regulatory due dates.
- Participate in the presentation and communication of client projects as requested.
- Assist in billing by inputting billable time with necessary details.
- Participate in training programs to develop a better understanding of retirement and actuarial concepts.
- Work within the fee budget established.

**Technical Skills**

- Strong project management skills.
- Ability to work on and complete multiple tasks under aggressive timeframes.
- Proactive with clients or other parties.
- Strong verbal and written communication skills.
- Ability to work both independently and within a team to meet common goals.
- Proficient in Microsoft Excel, Word, Outlook and PowerPoint.
- Experience with ProVal preferred.

**Education**

- Bachelor's Degree with major in related field or equivalent education and experience.



## **Experience**

- A minimum of one (1) to three (3) years of directly related retirement experience with a consulting firm or insurance company.
- Prefer 1-2 Actuarial exams passed.
- Ability to follow directions and focus on task at hand.
- Advanced Microsoft Excel experience/skills preferred.

## **Interpersonal & Team Working Skills**

- Ability to work well in an unstructured environment and deal successfully with conflicting priorities to meet deadlines.
- Demonstrate ability to state own opinions and ideas confidently without infringing on others.
- Ability to work collaboratively with colleagues and clients as demonstrated by finding common ground in completing tasks and solving problems by seeking input from colleagues and clients in order to make informed decisions.
- Demonstrate ability to establish rapport and gain the trust of others through active listening.
- Ability to act with integrity as demonstrated by regularly representing information accurately and honestly, interacting with others fairly and maintaining high standards of conduct despite pressure.
- Ability to function effectively without assistance or direction as demonstrated by regularly undertaking new tasks with minimum instruction or feedback.
- Works well within diverse groups to achieve common goals as demonstrated through support for team ownership of projects to ensure results and by supporting group goals over personal gains or using ideas or suggestions from others to improve productivity.
- Flexibility demonstrated by accommodating changing priorities and making sound decisions when faced with unclear situations.
- Attention to detail, demonstrated by regularly verifying all work thoroughly to ensure accuracy.
- Demonstrate ability to be proactive, creative and innovative in solving problems and issues.
- Ability to form sound opinions and make solid decisions as demonstrated by the use of common sense to determine what is appropriate to the situation.
- Takes initiative and undertakes new tasks without direction.
- Accepts accountability for work, including errors or misjudgments.
- Leverages the experience, expertise and work of others, where appropriate.
- Proactive in producing work product which meets or exceeds internal or external client expectations/needs.

Reports to: Senior Vice President (Retirement)

Interested candidates please email cover letter and resume to [gninfo@cowdenassociates.com](mailto:gninfo@cowdenassociates.com)