



▲ ACRISURE® | AGENCY PARTNER

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.

Primary Responsibilities:

- Assist actuaries and consultants with all aspects of pension actuarial client service: data reconciliation and management, asset reconciliation, liability production, funding results determination, government filing preparation, accounting results preparation, participant statements and benefit calculations, etc.
- Participate in the presentation and communication of client projects, as needed.
- Work within the established fee budget.
- Participate in training programs to develop a better understanding of retirement and actuarial concepts.

Technical and Interpersonal Skills:

- Strong verbal and written communication skills
- Strong project management skills
- Ability to work on and complete multiple tasks under aggressive timeframes
- Ability to work both independently and within a team to meet common goals
- Attention to detail, demonstrated by regularly verifying all work thoroughly to ensure accuracy
- Ability to act with integrity as demonstrated by regularly representing information accurately and honestly, dealing with others fairly and maintaining high standards of conduct despite pressure
- Ability to work collaboratively with colleagues and clients as demonstrated by finding common ground in completing tasks and solving problems and by seeking input from colleagues and clients in order to make informed decisions
- Experience in Microsoft Excel, Word, Outlook and PowerPoint

Education:

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

Experience:

- No prior experience required
- Ability to follow directions and focus on task at hand

Reports to:

Retirement Practice Leader and/or other Practice Consultants