



JOB INFORMATION

Job Code:	117042
Job Title:	Retirement Planning Specialist
FLSA Status:	Exempt
Supervisory:	
Job Family:	Employee Benefits
Job Family Group:	Human Resources
Management Level:	8 Individual Contributor
Retirement Planning Specialist	

JOB SUMMARY

Provides expertise on planning for and executing retirement processes. Works closely with relevant stakeholders to assist with retirement case management and educate the university community through workshops and seminars tailored to individuals at various stages of retirement. Champions the university's vision, culture and values.

JOB QUALIFICATIONS:

Education

Req	Pref	Degree	Field of Study	
X		Bachelor's degree		
	X	Master's degree		In
	X		Business Administration	Or
	X		Economics	Or
	X		Psychology	Or
	X		in related field(s)	

Additional Education

Check here if experience may substitute for some of the above education.

Combined experience/education as substitute for minimum education

Work Experience

Req	Pref	Work Experience	Experience Level	
X		5 years	in retirement savings administration.	
	X	7 years	in retirement savings administration, benefits administration, HR and higher education.	

Additional Work Experience

Check here if education may substitute for some of the above work experience.

Combined experience/education as substitute for minimum work experience

Knowledge, Skills and Abilities

Req	Pref	Functional Skills
X		Experience with benefits programs and demonstrated excellence providing personalized customer service.
X		Excellent written and oral communications skills, with experience designing and executing informational sessions or workshops.
X		Demonstrated ability to effectively manage time, prioritize tasks, work independently and maintain confidentiality.
X		Excellent research, analytical, critical thinking, problem solving and decision-making skills.
X		Ability to work independently and proactively, prioritize competing assignments, and provide assistance/guidance as needed on team projects.
X		Proficiency with Microsoft Office.
X		Ability to calculate and project retirement contribution amounts.
	X	Experience in leadership and people-building roles, with excellent interpersonal skills and relationship-building abilities.
	X	Experience with case management systems.

Certifications

Req	Pref	Select Certifications	Enter Additional Certifications
	X		Certified Benefits Professional, Certified Employee Benefit Specialist, or Certified Compensation Professional, or other similar certifications.

Other Job Factors

JOB ACCOUNTABILITIES

	% Time	Essential	Marginal	N/A
Provides practical and helpful guidance regarding financials and benefits to individuals at various stages of retirement, empowering them to make informed decisions. Performs accurate and timely enrollment transactions. Assists with retirement case management, including processing bank directives and transactions for defined benefit and other legacy retirement plans (e.g., 401(k), 403(b), 457(b)). Supports design and delivery of retirement education (e.g., seminars, workshops) to employees at various stages of their career. Updates case management entries in a timely manner as needed.				
Maintains open lines of communication with employees planning for retirement. Collaborates with relevant stakeholders to provide expertise on planning for and executing retirement processes. Communicates with HR information systems team and others as needed to ensure accurate data reporting and tracking. Provides timely and constructive feedback when solicited to maintain a high performing organization. Ensures retirement plan information is up to date and readily available for employees.				
Provides personal and informative individual appointments for employees, and proactively reaches out to varied parties to answer questions. Demonstrates thoughtfulness, attention to detail and understanding when communicating with employees. Coordinates with varied internal/external departments to ensure timely execution of retirement processes.				
Researches and promotes resolution of retirement benefit issues arising during and after retirement. Designs and conducts informational sessions. Collects and analyzes data from retirement sessions (e.g., attendance numbers, feedback) to guide future programming. Demonstrates fairness, impartiality and integrity in decision making. Solicits feedback from managers, peers and other employees for continuous improvements. Stays current with retirement administration trends and best practices, and shares improvements to processes and procedures with the broader team.				
Collects and analyzes data from retirement sessions (e.g., attendance numbers, feedback) to guide future programming. Conducts audits of retirement data entry and other processes. Analyzes data to produce clear reports as needed. Escalates questions to appropriate team members.				
Encourages a workplace culture where all employees are valued, value others and have the opportunity to contribute through their ideas, words and actions, in				

JOB ACCOUNTABILITIES

	<i>% Time</i>	<i>Essential</i>	<i>Marginal</i>	<i>N/A</i>
accordance with the USC Code of Ethics. Understands alignment between retirement administration and overall HR strategy. Demonstrate, through words, actions, and ideas, alignment to USC’s strategic plan and the HR organization’s strategic plan.				

Other Requirements

<i>Essential:</i>	<i>Emergency Response/Recovery</i>	<i>Essential:</i>	<i>Mandated Reporter</i>
	In the event of an emergency, the employee holding this position is required to “report to duty” in accordance with the university’s Emergency Operations Plan and/or the employee’s department’s emergency response and/or recovery plans. Familiarity with those plans and regular training to implement those plans is required. During or immediately following an emergency, the employee will be notified to assist in the emergency response efforts, and mobilize other staff members if needed.		A mandated reporter who in his or her professional capacity has knowledge of, or reasonably suspects a person who is under the age of 18 years, elderly, or a dependent adult has been the victim of abuse or neglect must report the suspected incident. The reporter must contact a designated agency immediately or as soon as practically possible by telephone or in writing within 36 hours. By virtue of the associated job duties, this position qualifies as a mandated reporter as required by state law and USC’s policy at: https://policy.usc.edu/mandated-reporters/
<i>Campus Security Authority (CSA)</i>			<i>Essential:</i>
By virtue of the associated job duties, this position qualifies as a Campus Security Authority as required by law and USC’s policy at: https://dps.usc.edu/alerts/clery/			

ACKNOWLEDGMENTS

The above statements reflect the essential and non-essential functions as necessary to describe the principle contents of the job. They are not intended to be a complete statement of all work requirements or duties that may be required of the position. I understand that I may be asked to perform other duties as assigned. USC reserves the right to add or change duties at any time.

The University of Southern California is an Equal Opportunity Employer. USC prohibits discrimination on any basis protected under federal, state, or local law, regulation, or ordinance or university policies. All employment decisions are based on individual qualifications and business need.

I acknowledge receipt of this job description and its associated physical requirements. I have read and understand the job description and job requirements and agree to abide by their contents. I realize that duties may be requested of me that are not specifically stated herein. I understand that I will be expected to adjust to potential fluctuations in work volume. I understand that, if I have any questions about the essential functions or expectations of my position, my supervisor and/or HR partner are available to discuss them with me.

Print Employee Name

Signature

Date

Print Manager Name

Signature

Date

This job description describes the general nature and level of work required by the position. It is not intended to be an all-inclusive list of qualifications, skills, duties, responsibilities or working conditions of the job. The job description is subject to change with or without notice, and Management reserves the right to add, modify or remove any qualification or duty. Nothing in this job description changes the existing at-will employment relationship between the university and the employee occupying the position.