



**Retirement Analyst/Senior Retirement Analyst
Montgomery County Government
Montgomery County Employee Retirement Plans
Rockville, MD**

[Montgomery County Employee Retirement Plans \(MCERP\)](#) is seeking a self-motivated candidate with retirement experience and strong organizational skills.

This is a senior level professional class that (1) performs analytical and advisory functions concerning the County's defined contribution and defined benefit retirement Plans, and (2) provides advanced-level retirement counsel and service to employees, retirees and other beneficiaries.

Major duties include, but are not limited to:

- Supporting actuarial evaluation of defined benefits
- Conducting studies to develop policy recommendations or identify the financial impact of changes in Plan designs
- Determining eligibility for various defined benefit and defined contribution Plans and Plan features
- Calculating benefit options, making adjustments to benefit amounts, and counseling employees/others, completing the retirement process
- Making adjustments after retirement based on Plan features, audits, major life events and other factors

Contacts are diverse and significant, and require the employee to maintain in-depth, up-to-date knowledge of the Plans administered and pension/retirement issues. This person in this position will require well-developed communication skills to exchange information about programmatic and operational matters with a diverse array of persons having varying levels of technical knowledge, viewpoints, and wants/needs. Communications will include financial impact details with actuaries and accountants to programmatic matters with members of the County Council to individual-specific benefits and options with rank-and-file employees, retirees and other beneficiaries.

WHAT YOU'LL BE DOING IN SPECIFIC PROGRAM AREAS:

Employees' Retirement System & Long-Term Disability

- Read and interpret retirement plan documents with a basic understanding of related rules and regulations.
- Prepare and review the processing of monthly pension and disability payments.
- Review Qualified Domestic Relation Orders (QDROs) according to County guidelines.
- Maintain and update member information in database.

Work with the ERP Implementation Team to ensure payment data integrity and systems security of retiree pension payments in the PeopleSoft module.

- Develop business processes.

Retirement Savings Plan and Guaranteed Retirement Income Plan

- Review participation by County employees in these plans to determine eligibility and processing of refunds.
- Read and interpret retirement plan documents with a basic understanding of related rules and regulations.
- Review of distribution forms.

All Retirement Plans

- Analyze and research complex financial issues and prepare written/oral reports addressing issues related to payments and benefits from the County's retirement plans.
- Provide guidance and assistance to County retirees on matters pertaining to pension payment activities.
- Assist with planning and conducting educational seminars, communication, and events for employees.
- Recommend new approaches and draft procedures to enhance the efficiency of the processing of retirement plan activities.

WHO WE ARE LOOKING FOR:

The ideal candidate will possess strong time management, problem solving and organizational skills and work effectively in a deadline driven environment. We are looking for someone who has considerable knowledge of and experience working with public pension and defined contribution retirement plans

IMPORTANT INFORMATION:

This position may be under-filled at the [Retirement Analyst, Grade N23](#), with a salary range of \$67,206 to \$107,367 (midpoint \$87,287). There is a non-competitive promotional opportunity to a [Senior Retirement Analyst, Grade N26](#), with a salary range of \$76,394 to \$122,842 (midpoint \$99,618). The anticipated hiring salary range is expected to be between the base and the midpoint of the ranges stated above.

Medical & Background Investigation (applies to both levels):

Selected candidate(s) will be required to successfully complete a Medical History Review, Drug and Alcohol screen and background investigation prior to appointment. A criminal background and credit history check will be conducted on the selected candidate prior to appointment and will be a significant factor in the hiring decision.

Montgomery County Government offers a generous benefits package. Learn more about our [Total Rewards](#):

MINIMUM QUALIFICATIONS**If filled at the Senior Retirement Analyst, Grade 26:**

Experience: Considerable (5 years) professional experience in the day-to-day administration of public pension plans, which included determination of eligibility, calculation of benefits, counsel of employees and retirees, coordination with service providers and application of a large number of eligibility and benefit variables across multiple plans, altogether vis-a-vis defined benefit plans and defined contribution plans.

Education: Bachelor's degree from an accredited college or university in business administration, public administration, accounting, economics, finance or another field that provided strong foundation in the area(s) of assignment.

If filled at the Retirement Analyst, Grade 23:

Experience: Three (3) years of professional experience in the day-to-day administration of public pension plans, which included determination of eligibility, calculation of benefits, coordination with service providers and application of a large number of eligibility and benefit variables across multiple plans, altogether vis-a-vis defined benefit plans and defined contribution plans.

Education: Bachelor's degree from an accredited college or university in business administration, public administration, accounting, economics, finance or another field that provided a strong foundation in the area(s) of assignment. Equivalency (applies to both levels): An equivalent combination of education and experience may be substituted.

BOTH LEVELS:

Equivalency: An equivalent combination of education and experience may be substituted.

Preferred Criteria

Applications of those individuals meeting the minimum qualifications will be reviewed to determine the extent, relevancy of training, and experience in the following areas:

- Experience with managing programs and projects.
- Experience with researching and identifying relevant sources of information and synthesizing and analyzing data of various complexity and importance.
- Experience with retirement benefits, including defined benefit and defined contribution retirement plans.
- Experience with computer applications/software such as Oracle, PeopleSoft, and the Microsoft Office Suite, including Excel, Word, and Access, to maintain databases and perform complex financial analysis.
- Experience with HRIS/pension systems & its functionalities in managing, reporting, improving retirement processes & services.
- Strong oral and written communication skills.

Montgomery County Government offers competitive salaries and excellent benefits.

To view the complete job announcement and to apply, please visit our website at <https://www.montgomerycountymd.gov/HR/Recruitment/MCGCareers.html>

and click on the “**Search Jobs and Apply**” tab.
Read the full job description under the “**General Professional**” Job Category.
Interested candidates must create an online account in order to apply.

The requisition number is **IRC60425**.

This Recruitment will Remain Open Until Position is Filled

All resume submissions must address the preferred criteria for the position,
which are listed in the full advertisement, preferably in a separate section of the resume.

Applicants are strongly encouraged to review the Resume Preparation Tips
listed under the “Career Resources” tab on the Office of Human Resource’s MCG Careers webpage.

EOE. M/F/H.