

**KERN COUNTY SUPERINTENDENT OF SCHOOLS**  
**REVISIONS APPROVED MARCH 2019**  
**RANGE: 43.5**  
**CLASSIFIED**  
**CODE: 4**

### **DEFINED BENEFIT SPECIALIST**

#### **DEFINITION**

Under general supervision to plan, organize, and perform specialized accounting, and preparation and review of financial and statistical records utilizing manual and computer-assisted processes.

Perform difficult and technical auditing of district and participant data.

Do other work required as it relates to the operation of the SISC Defined Benefit Plan (DBP).

#### **EXAMPLES OF DUTIES**

Perform specialized and complex functions in assembling, tabulating, calculating, verifying, and reconciling district accounts, participant benefits, and other fiscally related information and data for the SISC DBP;

assist in revision, formulation, and implementation of accounting, record management systems, employee letters, brochures, benefit statements, plan document, and related data management;

coordinate and lead in posting district data files, balancing and verifying of contributions and deposits, year-end benefit calculations, and annual pension statements;

assist districts with implementation and reporting requirements of the SISC DBP;

make presentations to district staff, employee groups, and seminars/workshops;

calculate and prepare wire transfers to trustee;

assist in the preparation of a variety of reports;

work with independent auditors in the conduct of the annual audit;

operate computer terminals and other business office machines and equipment;

provide information regarding routine legal mandates, policies, and regulations.

#### **QUALIFICATIONS**

##### Knowledge of:

Methods, practices and procedures of public accounting, defined benefit retirement plans, benefit calculations, record management, and organization and planning methods and techniques.

##### Ability to:

Perform complex, specialized accounting and benefit calculations;

prepare, review, analyze and reconcile district payroll data and contributions;

plan, organize and present information to large audiences;

effectively communicate the rules and regulations of the plan document;

establish and maintain cooperative working relationships;

calculate and prepare inter-district transfers;

efficiently operate computer accounting and financial programs, spreadsheet programs such as Excel, and other office machines and equipment.

Experience:

One year of highly responsible experience in accounting, payroll, record management and reporting, and retirement plan administration.

Education:

Equivalent to the completion of the twelfth grade, supplemented by training or coursework in accounting, business office procedures, or closely related fields.

Conditions of employment:

Some positions may require proof of privately owned automobile insurance and possession of a valid California Motor Vehicle operator's license which must be maintained for the duration of the assignment.

Fingerprint clearance by both the Federal Bureau of Investigation and the California Department of Justice is a condition of appointment after all other required job conditions have been met.

Must present verification of completion of Child Abuse Mandated Reporter training or obtain verification within six (6) weeks of hire and annually thereafter, as required by the California Child Abuse and Neglect Reporting Act.

This position has a probationary period of six months or 130 days, whichever is longer.

CP: rn

3/1/19

G:\Defined Benefit Specialist.doc