

FREEMAN

Analyst – Benefits, Retirement **Job Description**

<https://www.freeman.com/careers/benefits-retirement-analyst>

Job Code: Professionals
FLSA Status: Exempt
EEO Category: 20-Professionals
Employee Group: Full-Time
Employee Sub-Group: Salaried Exempt
Division: The Freeman Company
Department: Total Rewards
Reports To: Director - Benefits
Prepared By:
Prepared Date:
Approved Date:
Approved By:

SUMMARY:

This role primarily assists with the analysis of employee retirement plans including Employee Stock Ownership Plan (ESOP) and the 401K Retirement Plan. The individual will cross-train on other Benefits-related roles to provide coverage and support to the Benefits team.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Reviews and reconciles 401k remittance file.
- Runs reports and verifies data in preparation of ESOP allocation.
- Ensures accurate reporting to individual employees via quarterly and annual statements.
- Works with vendors to investigate discrepancies and provide information in non-routine situations.
- Evaluates and compares existing retirement benefits with those of other employers by analyzing other plans, surveys, and other sources of information and makes recommendations for improvement.
- Analyzes results of comparison and surveys and develops specific recommendations for review by management.
- Analyzes employee utilization of current benefits and develops specific recommendations for review by management.
- Functions as SME for employee retirement benefits.
- Performs other duties as assigned.

FREEMAN'S FUNDAMENTAL PRINCIPLES:

1. **Adaptability** - Effectively adapts to changing work environments. Remains flexible in spite of adversity. Embraces change from current environment to desired future state. Adapts effectively to changing technology and changing job demands.
2. **Resourcefulness** - Takes steps to improve processes, correct errors, and expand overall products or services in order to meet the customer's changing needs. Strives for continuous improvement and, ultimately, perfection by identifying opportunities and accessing risks. Supports an environment that is conducive to change and fosters a free exchange of ideas to improve processes.
3. **Customer Focus** - Provides excellent customer service to clients, vendors, and/or fellow Freeman employees. Responds promptly, professionally, effectively, and efficiently to internal and external customer needs. Manages difficult or emotional situations. Recognizes sense of urgency in responding to needs. Follows up to ensure requests, needs, and commitments are met consistently. Displays an attitude of friendliness and service towards our customers and a willingness to make the extra effort to satisfy their needs.
4. **Dependability** - Meets deadlines and commitments to ensure the job gets done. Consistently completes assignments in an accurate and timely fashion. Commits to long hours of work when necessary to reach goals. Demonstrates ability to work independently. Meets deadlines and performs at expected level in typical circumstances as well as unexpected circumstances.

5. **Ethics** - Exemplifies and integrates Freeman's code of ethics into all aspects of management. Supports and upholds the organization's standards and values. Demonstrates honesty, reliability, and professionalism. Maintains the highest ethical standards in Company policy and employee conduct. Discourages violation of ethical conduct. Ensures sensitive information remains confidential.

JOB SPECIFIC REQUIREMENTS:

1. **Analytical Skills** - Synthesizes complex or diverse information using intuition, research and experience to complement data provided. Reviews & analyzes a wide variety of information and recommends a specific course of action.
2. **Business Process Improvement** - Takes steps to improve or correct errors and expand overall products or services. Strives for continuous improvement by identifying opportunities and assessing risks. Supports an environment conducive to change and fosters free exchange of ideas to improve processes.
3. **Critical Thinking** – Uses logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
4. **Mathematical Reasoning** - The ability to choose the right mathematical methods or formulas to solve a problem. Ability to create or interpret graphs, tables, and formulas.
5. **Problem Resolution** – Analyzes problems and alternative solutions and takes appropriate timely action to achieve desired business results. Seeks unique and novel solutions to problems and considers impact of final resolution.
6. **Productivity** - Stays focused and uses time efficiently. Prioritizes work effectively. Performs work with minimal supervision.
7. **Reasoning Ability** - Ability to apply common sense understanding to assignments or role.
8. **Drive to Perform** - Identifies and accomplishes challenging objectives or personal goals. Works effectively with others to achieve goals. Looks for and takes advantage of opportunities. Maintains a high level of interest, enthusiasm and personal focus.
9. **Technical Skills** - Ability to understand and interpret the laws, rules, policies, procedures, or systems related to the job.
10. **Technology** - Generates or adapts equipment and technology to serve user needs. Writes or interprets computer programming for various purposes.

SUPERVISORY RESPONSIBILITIES:

Not applicable

QUALIFICATIONS:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed herein are representative of the knowledge, skill, and/or ability required.

- Strong data analytics skills, with high-level working experience with advanced Microsoft Excel tools (like v-lookup).
- Ability to review data and quickly determine the usability of said data.
- Ability to collaborate with all key stakeholders for proper understanding of all links within the data being reviewed.
- Self-motivated and comfortable with self-guided research.
- Excellent organizational and communications skills.
- The capacity to work independently and efficiently on a variety of tasks at the same time.
- A commitment to following through effectively on all requests from internal customers.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

EDUCATION AND EXPERIENCE:

- A Bachelor's Degree and/or 5 years of related work experience.
- Experience using Microsoft Office, especially Excel.
- Experience with complex systems (like SAP or other), systems navigation and reporting.

WORK SCHEDULE:

Business hours are Monday - Friday, 8:00 a.m. to 5:00 p.m. Extended business hours and weekends will be required.

CERTIFICATES, LICENSES, REGISTRATIONS:

None required.

TRAVEL DEMANDS:

None required.

PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this Job, the employee is regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms and talk or hear. The employee is occasionally required to stand; walk; drive, climb, balance, stoop, kneel, crouch, or crawl.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually quiet. The employee will be required to work long hours as needed.

COMMENTS

The position described above is a general outline of the job's responsibilities and requirements. The duties may increase or decrease at any time at the discretion of management.