

LEAD SPECIALIST - SR. SPECIALIST - BENEFITS & RETIREMENT PROGRAM

79-00524

Who We Are:

The Employee Benefits Office (EBO) provides assistance to SwRI staff for available benefit programs. EBO assists staff members, retirees, and dependents with information, enrollment, service assistance, changes, and additional activities relevant to healthcare, insurance, and retirement benefits.

Objectives of this Role:

- Serve as the retirement plan representative responsible for the administration and recordkeeping of employee 403(b) and 457(b) retirement plans.
- Manage all compliance activities for retirement income plans required under ERISA, IRS, and other Federal, State, and Local regulations and legislation.
- Plan and setup all internal and external communications related to the retirement income program.
- Serve as a resource for employees, managers, HR representatives, and plan participants seeking information regarding retirement income plans and Social Security.

Daily and Monthly Responsibilities:

- Communicate retirement plan information to new employees as part of new hire orientation and provide assistance to new employees with the initial enrollment into the 403(b) retirement plan.
- Provide phone, email, and in-person support to existing employees, managers, and other plan participation with information on retirement plans.
- Coordinate and actively participate in all meetings, phone calls, and other interactions with plan provider of 403(b) and 457(b) retirement program.
- Monitor, review and approve plan processes (such as managing forfeitures, loans and other participant transactions, and plan servicing credits transactions) to ensure all activities are being operated accurately.
- Assist employees and other plan participants with post-employment activities related to retirement plan balances, such as transfers, withdrawals and required distributions.

Requirements:

- Requires a Bachelors with a 3.00 GPA in Accounting, Finance, or related fields with related experience
- 6 years: Experience in finance, banking, accounting, or auditing responsibilities; other degree fields may be considered with experience in the administration or auditing of 401(k) or 403(b) retirement plans
- Experience with the research and monitoring compliance with laws, regulations, or other areas of governmental oversight
- Must be proficient with Microsoft Word and Outlook and with MS Excel, including a high degree of experience with complex spreadsheet structures and reporting
- Excellent communication skills with experience communicating at all levels of an organization and presentation to large groups; must have the ability to communicate and handle sensitive personal information in a confidential and professional manner
- A valid/clear driver's license is required

Job Location: San Antonio, Texas

To apply: https://resapp.swri.org/ResApp/Job_Details.aspx?JOB_CD=79-00524

For benefits information at our San Antonio location, click [here](#).

For benefits information at all other locations, click [here](#).

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