

San Joaquin County Employees' Retirement Association is recruiting for

Retirement Services Officer



The San Joaquin County Employees' Retirement Association (SJCERA) administers a defined benefit plan for San Joaquin County and is a trusted steward committed to providing excellent customer service and lifetime benefits to our members.



SAN JOAQUIN COUNTY
EMPLOYEES' RETIREMENT
ASSOCIATION

San Joaquin County Employees' Retirement Association—SJCERA

SJCERA was established in 1946 by the San Joaquin County Board of Supervisors to provide retirement, disability, and death benefits to employees of San Joaquin County and other participating employers. Visit the [Employers](#) page for a list of SJCERA's participating employers.

SJCERA is a defined benefit plan, qualified under Section 401(a) of the Internal Revenue Code. A defined benefit plan is an employer-sponsored retirement plan that provides members a lifetime benefit based on a formula using age at retirement, years of service, and final average compensation. SJCERA administers the benefits in accordance with the provisions of the County Employees Retirement Law (CERL) of 1937, the Public Employees Pension Reform Act (PEPRA) of 2013, and the Internal Revenue Code.

SJCERA is governed by an independent, nine-member [Board of Retirement](#). SJCERA's mission is to be trusted financial stewards committed to providing excellent service and lifetime retirement benefits to our members.

Typical Duties Include:

- Oversees and determines the retirement eligibility of members; verifies pertinent documents relating to member's eligibility; computes and explains various benefit options to members and beneficiaries.
- Analyzes retirement applications and supporting documents and provides appropriate recommendations to the Board of Retirement regarding final approval of retirement and health benefits.
- Provides and oversees assistance to members regarding domestic relations orders and disability retirement applications.
- Oversees the work of subordinate staff with regard to calculations for repurchase of service, withdrawal of contributions, and deferred retirement calculations.
- Oversees the work of subordinate staff with regard to verifying and calculating retiree retirement benefits, taxation factors and sick leave bank accruals.
- Oversees and/or processes retirement death benefits; may meet with surviving beneficiaries and explains benefit options.
- Corresponds with members, other retirement systems and other interested parties regarding various aspects of the retirement system.
- Assists with the collection and verification of retirement data to the fund's actuary for annual actuarial study; assists the auditor with annual audit of retirement system.
- May prepare and conduct retirement presentations and seminars for members of the retirement system and other interested parties.
- Assists with the development of booklets, newsletters and other communication tools for providing information to retirement system members.



Ideal Candidate

The Retirement Services Officer for San Joaquin Employee’s Retirement Association will demonstrate the following skills and abilities:

- Excellent analytical skills, which include researching, compiling, computing, and presenting statistical information .
- Ability to interpret complex statutory and regulatory provisions of applicable benefits law found in federal, state and retirement association regulations.
- Works well both independently and with a team.
- High level of integrity and a strong professional work ethic.
- Proficiency in preparing and interpreting various accounting statements and other financial records and reports.
- Ability to help organize and direct the work assignments of subordinate personnel.
- Understanding of public communication including public speaking and effectively writing letters, procedures and pamphlets for public consumption.

Minimum Qualifications

PATTERN I

Education: Graduation from an accredited four year college or university with a major in business or public administration, finance, economics, accounting, or a closely related field.

Experience: Two years of responsible experience researching, resolving and processing personnel, payroll, and/or complex retirement benefit plans at a level comparable to Retirement Services Associate in San Joaquin County.

OR PATTERN II

Education: Completion of 60 semester units from an accredited college or university with an emphasis in business or public administration, finance, economics, accounting, or other field with emphasis in business subjects.

Experience: Four years of progressively responsible experience researching, resolving and processing personnel, payroll and/or complex retirement benefit plans to include two years at a level equivalent to Retirement Services Associate in San Joaquin County.

AND FOR BOTH PATTERNS

License: Possession of a valid California Driver's License or the ability to arrange necessary and timely transportation for field travel.

Compensation and Benefits

San Joaquin County offers competitive wages and a strong benefit package which includes:

Annual Base Salary:
\$73,542.44—\$89,391.30

San Joaquin County

Human Resources

44 N. San Joaquin St.-Ste 330

Stockton, CA 95202

(209) 468-3370

Equal Opportunity Employer

Competitive Benefit Package:

- ◆ Defined benefit retirement plan with reciprocity with most other California public retirement plans
- ◆ 10 days of vacation leave a year (*15 days after 3 years, 20 days after 10 years, 23 days after 20 years*)
- ◆ 12 days of sick leave annually with unlimited accumulation
- ◆ 10 paid holidays per year
- ◆ 125 Flex Benefits Plan
- ◆ Merit Salary Increases
- ◆ Educational Reimbursement
- ◆ Health, Dental and Vision Insurance

For more benefit information, please access the County's benefits website at:

<https://www.sjgov.org/department/hr/programs-services/benefits>

Application and Selection

The competitive process includes submittal of a completed San Joaquin County Employment application and Supplemental Questionnaire. Resumes will not be accepted in lieu of a complete application package. If a formal exam process is utilized, qualified applicants will be invited to participate in an oral examination interview which may include a practical exercise. The top-scoring candidates will be referred to the department for a hiring interview. To apply, submit a completed application and supplemental questionnaire on or before the final filing date.

To apply, visit our [webpage](#) or scan this QR code with your smartphone's camera.

Final Filing Date: **July 19, 2024**

SAN JOAQUIN
—COUNTY—
Greatness grows here.



Ideal Candidate

The Retirement Services Officer for San Joaquin Employee's Retirement Association must possess the following skills and abilities:

- Excellent analytical skills, which include researching, compiling, computing, and analyzing information .
- Ability to interpret complex statutory and regulatory provisions of applicable both federal, state and retirement association regulations.
- Works well both independently and with a team.
- High level of integrity and a strong professional work ethic.
- Proficiency in preparing and interpreting various accounting statements and other financial statements and reports.

Minimum Qualifications

PATTERN I

Education: Graduation from an accredited four year college or university with a major in public administration, finance, economics, accounting, or a closely related field.

Experience: Two years of responsible experience researching, resolving and processing payroll, and/or complex retirement benefit plans at a level comparable to Retirement Services Associate in San Joaquin County.

OR PATTERN II

Education: Completion of 60 semester units from an accredited college or university in business or public administration, finance, economics, accounting, or other field related to business subjects.

Experience: Four years of progressively responsible experience researching, resolving payroll, personnel, payroll and/or complex retirement benefit plans to include two years at the Retirement Services Associate in San Joaquin County.

AND FOR BOTH PATTERNS

License: Possession of a valid California Driver's License or the ability to arrange for transportation for field travel.