

**KERN COUNTY SUPERINTENDENT OF SCHOOLS  
APPROVED AUGUST 2001  
RANGE: 43.5  
TECHNICAL/SPECIALSIT SERVICES SERIES  
CLASSIFIED  
CODE: 4**

### **DEFINED BENEFIT SPECIALIST I**

#### **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**

Performs 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;

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

coordinates and leads in posting district data files, balancing and verifying of contributions and deposits, preparation of financial statements, year-end benefit calculations, and annual pension statements;

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

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

calculates and prepares wire transfers to trustee;

assists in the preparation of a variety of reports;

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

operates computer terminals and other business office machines and equipment;

provides 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.

Some positions may require proof of privately owned automobile insurance and possess a valid California Motor Vehicle operator's license.

**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.**

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

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