



**North Atlantic States
CARPENTERS BENEFIT FUNDS**

**Pension
Fund**

Position Description

Position Title	Annuity & Pension Analyst
Department	Annuity & Pension Fund
Location	Hauppauge, NY
Reports to	Annuity & Pension Fund Managers

SUMMARY

The North Atlantic States Carpenters Benefit Funds (NASCBF) is responsible for the benefit plan operation for Massachusetts, Connecticut, Rhode Island, Maine, New Hampshire, Vermont, and New York. We support approximately 24,000 active members and 23,000 retirees. The NASCBF administers three retirement plans, a self-insured/self-administered health plan, and a vacation savings plan.

Essential Duties and Responsibilities:

- Analyze and respond to requests received by mail, Internet, telephone, or in-person from participants regarding their Annuity account balances and eligibility for benefits.
- Determine benefit amounts available to participants and provide annuity statements and applications upon request.
- Assist participants with applications for benefits, loans, or withdrawals; review applications for completeness. Follow-up with participants regarding missing information.
- Review withdrawal applications to verify participant eligibility, confirm available account balances, ensure required documentation is complete, and make determinations in accordance with Plan rules and regulations.
- Review and verify the accuracy of work performed by associates within the department
- Review legal correspondence received such as Domestic Relation Orders, Subpoena's, Levy's and Court Orders. Coordinate all processes and correspondence relating to the Domestic Relations Orders, Subpoena's, Levy's and Court Orders by working with the Fund professionals.
- Process monthly benefit payments and direct deposits as required by the Fund Administrator and Board of Trustees.

- Coordinate with the Accounting Department the distribution of monthly benefit payments and direct deposits and prepare applicable reports required of the Accounting Department.
- Maintain accurate files for all participants including current contact information, beneficiary information, banking information, tax related information etc.
- Locate deceased member records to determine whether any death benefits are applicable & correspond with beneficiaries to process any benefit due.
- Locate missing participants who are eligible for benefits
- Review weekly reports (life status death notifications, mismatch and demographics)
- Balance annuity department Year End totals in preparation for Year End processes. Participate in preparation of the 1099R Forms.
- Collaborate with the health department to review and determine the eligibility of withdrawals for medical expenses and premiums.
- Provide support to the department manager, prepare and assist in mailings & participant outreach efforts including retirement seminars, and any additional duties assigned.
- This position primarily supports the administration of the Annuity Fund but will also assist with Pension Fund duties, including participant inquiries and eligibility determinations.
- Filing and scanning within the Pension and Annuity department.
- Perform various office duties and cover reception desk as required.
- Other duties as may be assigned.

Education / Experience / Requirements:

- Post-secondary education (minimum associate's degree or high school diploma with relevant business experience)
- Experience in employee benefits, with a strong background in Defined Contribution Annuity Plans.
- Strong working knowledge of processing systems including Microsoft Office suite.
- Ability to work in a team environment and willingness to cross-train in all areas of Pension and Annuity benefits.

- Excellent interpersonal and communications skills; ability to interact effectively with internal staff and external clients.
- High level of attention to detail

Benefits:

At North Atlantic States Carpenters Benefit Funds, we offer a comprehensive benefits package that includes (once eligible) employer funded medical, dental, vision, life and disability insurance plans. We also offer paid holidays, vacation, PTO and two retirement plans. At NASCBF, our employees enjoy a 37.5 hour work week, a good work-life balance and work that is always challenging. When you join us you will have the ability to make a difference!