



North Atlantic States CARPENTERS BENEFIT FUNDS

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North Atlantic States Carpenters Benefit Funds Employment Opportunities

POSITION DESCRIPTION

Position Title: File Clerk

Department: Pension / Annuity

Reports To: Retirement Services Manager

Location: Wilmington, MA

This is a Bargaining Unit Position. Union Membership is required

SUMMARY

North Atlantic States Carpenters Benefit Funds (NASCBF) provides important benefit programs to the North Atlantic States Regional Council of Carpenters (NASRCC). This organization represents more than 30,000 carpenters in Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island and Vermont. Through the support of our fund offices, NASRCC members enjoy great benefits that provide a rewarding life for themselves and their families. The File Clerk will prepare, administer, review, and analyze applications from members of the NASCBF pension and annuity plans under the supervision of the Retirement Services Manager.

ESSENTIAL DUTIES & RESPONSIBILITIES

- Answer requests by mail, Internet, telephone, or in person from members concerning the request for copies of tax returns.
- Coordinate retiree responses with appropriate mailings for copies of tax returns from pensioners. Review and track responses to determine whether further review is necessary.
- Assist department members in any further action regarding prohibited employment that may be necessary as a result of management determinations.
- Process applications for loans.
- Process pensioner/beneficiary requests or changes to member database such as tax changes, EFT requests or changes, Health Premium Deduction changes.
- Initiates stop payments, voids, and replacement checks.
- Maintain accurate files for all participants, including current information, beneficiaries, and any transactions in their account.
- Record, photocopy, and scan weekly loan applications and forward them to financial institutions for issuance of checks.

- Process Beneficiary Designation forms.
- Responsible for filing and scanning within the Pension and Annuity department.
- Perform various office duties and cover the reception desk as needed.
- Provide administrative support to the department manager and assistant manager.
- Assist with special projects.
- Perform general clerical duties as needed.
- Other duties as assigned.

EDUCATION & EXPERIENCE

- Post-secondary education (minimum Associate's degree or High School diploma with relevant business experience)
- Experience in employee benefits, with a concentration in retirement plans, is a plus.
- Strong working knowledge of processing systems, including Microsoft Office suite (Word, Excel).
- Ability to work in a team environment and willingness to cross-train in all areas of Pension and Annuity benefits.
- Excellent interpersonal and communication skills; must be able to interact effectively with internal staff and external clients.
- Bilingual (English/Spanish) a plus.

PHYSICAL REQUIREMENTS

- Regularly required to operate standard office equipment (personal computer, photocopy machine, fax machine, etc.).
- Ability to work on a computer up to 7 hours a day.
- Regularly required to sit for long periods and occasionally stand and walk.
- Regularly required to use hands to operate computer and other office equipment.
- Close vision is required for computer usage.

BENEFITS

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

Pay: From \$23.25 - \$27.56

Benefits:

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| • Dental insurance | • Parental leave |
| • Employee assistance program | • Retirement plan |
| • Health insurance | • Tuition reimbursement |
| • Life insurance | • Vision insurance |
| • Paid time off | |