CLASS TITLE: DEFERRED COMPENSATION PROGRAM CLERK

DEFINITION:
Under general supervision, performs difficult and specialized clerical duties in the preparation and processing of a variety of reports, forms and records for program participants and member districts; maintains complex records and files; and assists the Deferred Compensation Program Manager in the performance of more complex tasks.

REPRESENTATIVE DUTIES:
This position description is intended to describe the general nature and level of work being performed by the employee assigned to the position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with the position. Incumbents may be required to perform any combination of these duties. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

ESSENTIAL FUNCTIONS:
Prepares, maintains and reviews a variety of reports, forms and records pertaining to FBC 457/403(b), ARS 3121, retirement incentive, 401(a) and other retirement plans.
Maintains program participants and member district records on a computerized record keeping system.
Posts information to control records where judgment must be exercised in the selection of data.
Prepares special and periodic reports which involves compiling materials and data from a number of sources.
Responds to questions and provides information to plan participants and member districts requiring the interpretation of policies, procedures, rules and regulations.
Creates charts, graphs and other presentation materials.
Schedules meetings and appointments; maintains calendars.
Meets strict deadlines as established by various retirement plans and overall program protocols.

NON-ESSENTIAL FUNCTIONS:
Performs related duties as assigned.

CREDENTIALS, CERTIFICATES, LICENSES OR OTHER REQUIREMENTS:
None
EDUCATION AND EXPERIENCE:
A combination of education, training or experience equivalent to two years of increasingly responsible experience in the maintenance and preparation of financial, statistical or retirement records, including the use of microcomputers and related software and spreadsheet applications. Experience with Deferred Compensation Program and/or public employee retirement systems is highly desirable.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:
Retirement systems
Computerized spreadsheets
Online management information systems
Modern office-clerical practices and procedures

ABILITY TO:
Operate a computer and a variety of related software, including spreadsheet and database applications
Type accurately at a rate of speed sufficient for successful job performance
Verify and compile numeric data
Perform computational tasks accurately
Prepare reports, correspondence and forms
Maintain complex filing and record keeping systems
Communicate orally and in writing
Follow oral and written instructions
Conduct basic research
Interpret and explain policies, procedures, rules and regulations
Maintain effective relationships with those contacted in the course of work
Work effectively independently and as part of a team with minimum supervision
Organize and prioritize work
Exercise appropriate judgment in making decisions
Maintain confidentiality of information
Work in a frequently fast-paced office environment.
Demonstrate attendance sufficient to complete the duties of the position as required
Complete routine tasks thoroughly, accurately and with attention to detail

WORKING CONDITIONS & PHYSICAL ABILITIES:
Duties are typically performed in an office setting.

Must be able to hear and speak to exchange information; see to perform assigned duties; sit and/or stand for extended periods of time; possess dexterity of hands and fingers to operate a computer and other office equipment; kneel, bend at the waist, and reach overhead, above the shoulders and horizontally, to retrieve and store files and supplies; lift light objects.
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<tr>
<th>Established</th>
<th>Approved by the Personnel Commission</th>
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