



Bilingual (Spanish-speaking) Member Relations Associate
PENSION FUND OF THE CHRISTIAN CHURCH

*Join our Team to Ensure the Growth of \$3.6 Billion in Assets
and Serve our 14,000+ Members who Serve Others*

Pension Fund of the Christian Church is seeking an entrepreneurial and mission-minded team member to join our team as a **Bilingual Member Relations Associate**. For the right candidate, this position will create the opportunity to work in a personally fulfilling environment while being part of a purpose-driven organization that works to secure the financial futures of our 14,000+ members. Pension Fund, as part of our strategic plan, is committed to be a Pro-Reconciliation / Anti-Racism organization. This role is an important addition and part of growing our commitment through action in serving our Spanish speaking members.

BACKGROUND

Pension Fund currently has assets in excess of \$3.6 Billion. In service to our members, Pension Fund partners with employers to:

- Offer financially secure retirement savings options and education for pastors and lay employees of the Stone-Campbell movement, including financial support of surviving family members and provisions for those who become disabled;
- Invest and prudently manage the resources of our members - maximizing returns, minimizing costs and assuming the burden of market risk;
- Engage members with compassionate care and personalized attention;
- Steward the assets and programs of Ministerial Relief and Assistance; and
- Utilize current and compliant processes.

Our products include a defined benefit pension with death and disability benefits; a 403b tax-deferred account (TD); Roth IRA; Traditional IRA; Benefit Accumulation Account (BA) (similar to a money market account); and Medicare Supplemental plans. We are one of more than 70 IRS approved non-bank trustees in the US.

Pension Fund members are part of the Stone-Campbell movement, including but not limited to the Christian Church (Disciples of Christ), Christian Churches and Church of Christ, Church of Christ / Disciples of Christ International, and Churches of Christ (acapella) in the United States. We operate a Retirement Contribution Account (RCA) plan in Canada and a Pension Plan in Puerto Rico.

APPROACH

Every day when they wake up, our ideal candidate will be inspired to be part of a customer-focused, entrepreneurial, and results-driven team. They will find inspiration in the hard work our organization does to ensure financially secure retirement plans for our members in congregations, the international mission field, institutions of higher education, benevolent care facilities, and other expressions of the movement.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following:

- Handles customer service phone calls when members have selected our Spanish preferred option.
- Consistently meet and exceed customer-centric standards for excellence.
- Maintain and contribute to a positive workplace environment by striving for excellence relative to Member Relations Center colleague interactions.
- Handle inbound and outbound calls to and from members and customers by listening to customer's needs and/or issues and providing solutions.
- As part of the organization's four Spanish speaking employees, will assist with a variety of written translation duties like marketing materials, presentations, and communications from the President.
- Process customer calls and provide accurate answers to their queries and concerns.
- Collaborate with other Member Relations Associates to improve customer services and processes.
- Guide members through accessing and conducting transactions via the member portal.
- Process withdrawal request(s) for various product types (i.e. Benefit Accumulation Account, Tax-Deferred Retirement Account, Traditional Ira, Roth IRA, Legacy IRA)
- Responsible for the accurate processing of all member requests/transactions.
- Validate social security numbers for new and existing contacts.
- Assist with the processing of address changes, Power of Attorney information, and changes in personal information.
- Responsible for the accurate processing of all member and member related deaths. This includes receiving the death memorandum; case creation/maintenance; providing condolence letter; requesting supporting documentation to process death; and payout of all benefits; account transfers, set up of surviving spouse pensions. Creates and updates current member/contact information as needed.
- Receive and process all changes to both federal and state tax withholding.
- Review and respond to emails.
- Review and process changes to beneficiary designations.
- Enter new contact and relationship information as needed.
- Log and acknowledge housing allowance designations as needed.
- Update Verification of Benefit letter template per member request.

OTHER DUTIES AND RESPONSIBILITIES

- As time allows, assist Member Relations Associates.
- Assist with projects as requested.
- Complete HIPAA training as scheduled.

QUALIFICATIONS

- Bilingual in Spanish with proficiency in spoken and written translation.
- Excellent organizational skills.
- Attention to details, ability to multi-task and work well under pressure.
- Strong interpersonal communication skills.
- Passionate about customer service.
- Ability to thrive in a team environment.
- Experience translating bank/financial information is preferred.

EDUCATIONAL REQUIREMENTS AND/OR EXPERIENCE

- 1-3 years of experience in call center environment.
- High School diploma.
- Associate degree (or higher) in Business preferred, but not required.

TRAVEL

- Up to 10% for educational and business functions.

PHYSICAL ENVIRONMENTAL DEMANDS

- Office environment.
- Comfortable wearing a headset.
- The ability to lift/carry up to 5 pounds.

Salary & Benefits

- 14% of salary contributed to the pension plan;
- Full family coverage for health, vision, and dental;
- Two times annual salary in our group term life policy;
- Full vacation benefits;
- A matching tax deferred retirement account;
- Educational assistance up to the maximum allowed by the IRS as nontaxable income; and,
- A family-oriented office environment with flexible work schedules.

Candidates will be reviewed on a rolling basis and applications will remain open until the position is filled.

Pension Fund does not discriminate in employment opportunities or practices on the basis of race, color, religion, sex, national origin, handicap, age, sexual orientation, status as a parent, or any other characteristic protected by law.