



## ***Member Relations Associate 1***

### **PENSION FUND OF THE CHRISTIAN CHURCH**

*Join our Team to Ensure the Growth of \$3.5 Billion in Assets  
and serve our 14,000+ Members who Serve Others*

#### **SUMMARY**

This position reports to the Director of Member Relations. The Member Relations Associate I position is responsible for contributing to the culture of excellence as envisioned by the Pension Fund President. This culture of excellence begins with modeling and maintaining a positive attitude and willingness to consistently exceed expectations while interacting with all members, stakeholders and staff. The Member Relations Associate I position will consistently deliver excellent customer service by assisting current and future members and churches/organizations with questions and concerns regarding participation, accounts, and membership; directing calls to appropriate staff members when unable to answer questions; and completing tasks as assigned by the Director of Member Relations, Assistant Director of Member Relations, and SVP of Operations.

#### **BACKGROUND**

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 (Restoration) 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 Plan with death and disability benefits; a Tax-Deferred Retirement Account 403(b)/Roth 403(b); Roth IRA; Traditional IRA; 457(b); and Benefit Accumulation Account (BAA) (a high-yield savings account). We are one of more than 60 IRS approved non-bank trustees in the US.

Pension Fund members are part of the Stone-Campbell (Restoration) 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 Compensation Arrangement (RCA) plan in Canada and a Pension Plan and the Tax-Deferred Retirement Account 403(b) in Puerto Rico.

**ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.**

- Answer phones and consistently meet and exceed customer-centric standards for excellence. While in training and at the beginner level will direct more advanced calls to higher level associates within the first 6 to 12 months.
- Maintain and contribute to a positive workplace environment by striving for excellence relative to Call Center colleague interactions.
- Process withdrawal request(s) for Benefit Accumulation Accounts.
- Check, log, and return PFCC voicemail messages.
- Validate social security numbers and tax identification numbers via TIN check website.
- Assist with the processing of address changes, bank changes, and changes in personal status.
- Review and process changes to beneficiary designations.
- Enter new contact and relationship information as needed.
- Send housing allowance confirmation letters.
- Provide research to Treasury for banking functions.
- Works on basic departmental special projects as assigned.
- As time allows, assist other Member Relations Associates with cases, tasks and special projects.
- Process mail in the office biweekly

#### **MRA I (Beginner/learning)**

**Level I Summary:** Applies basic skills while developing some specialized skills in procedures, operations, techniques, tools, materials, and/or equipment appropriate to the Member Relations Center; performs routine and/or repetitive tasks; limited decision making required; generally, works under close supervision; has no or limited experience; work is performed from within specific limits of established procedures and/or defined instructions.

***To be promoted from Level I to Level II, the skills for a MRA II below should be obtained: If training is not completed due to supervisor lack of scheduling, you will not be penalized. See cross training skills chart to determine where training is needed. Timeframe: 6 to 18 months***

#### **OTHER DUTIES AND RESPONSIBILITIES**

- Complete HIPAA training as scheduled.
- Additional duties as applicable.

#### **COMPETENCIES**

- Excellent organizational skills.
- Attention to details, ability to multi-task, work well under pressure.
- Strong interpersonal communication skills.

- Passionate about customer service.
- Ability to thrive in a team environment.
- Bi-lingual preferred but not required.

## **EDUCATIONAL REQUIREMENTS AND/OR EXPERIENCE**

- 1-3 years of experience in call center or high-volume customer contact environment.
- High School diploma or equivalent.
- Associate's degree (or higher) in Business preferred but not required.

## **TRAVEL**

- Up to 15% for mail processing as well as educational and business functions.

## **PHYSICAL ENVIRONMENTAL DEMANDS**

- 85% Remote office environment.
- Comfortable wearing a headset.
- The ability to lift/carry up to 5 pounds.

## **POSITION TYPE**

- Full-time, non-exempt role that requires a minimum of 37.5 hours per week.
- Occasional evening and weekend hours for special events.

## **BENEFITS**

- 14% of salary contributed to the pension plan.
- Full family coverage for health, vision, and dental.
- Generous paid time off policy.
- Ability to contribute to a tax-deferred retirement account with an employer match that grow with the length of service.
- Employer paid group term life policy.
- Opportunities for educational assistance.
- A family-oriented office environment with flexible work schedules.

*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.*

If you are interested in applying for this position, please apply at <https://pensionfund.surveymonkey.com/r/pfccMRC1>