

Job Description – Pension Fund Specialist

This form summarises the purpose of the job and lists its key tasks. It is not a definitive list of all the tasks to be undertaken as those can be varied from time to time at the discretion of the employer, in consultation with the postholder.

Job title: Pension Fund Specialist

Employer: RESAVER, an EU-funded occupational pension fund for research organisations

Accountable to: Pension Fund Manager

Experience level: Mid-Senior Level

Part time: possible, minimum 25 hours per week

Place of work: EU

Remote position: yes, requires occasional travel within Europe

Context

RESAVER Pension Fund is a dynamic, cross-border pension solution designed for research organisations and their employees. We play a crucial role in strengthening the European Research Area by ensuring the research talent retains membership in the same pension vehicle when moving between countries and/or when changing jobs. Sponsored by the European Commission, RESAVER is rapidly growing and expanding its client base across key European markets, including Belgium, France, Spain, Italy, The Netherlands, Austria, Cyprus, Hungary and the Czech Republic.

Benefits:

- This role is an excellent opportunity for a dedicated individual to be part of a motivating governance team to contribute to the successful expansion of the RESAVER Pension Fund.
- We offer an entrepreneurial, supportive and collaborative working environment.
- We offer flexibility on full or part time working.
- Competitive salary and benefits package

Job Summary:

The Pension Fund Specialist supports the Pension Fund Manager in ensuring the efficient, compliant and sustainable operation of the pension scheme via coordinating different activities within the daily and periodic (quarterly and annual) fund management tasks. The postholder is responsible for assisting with

the monitoring of pension administration and other functions and budgets while supporting the Board of Directors to adhere to internal policies and legal obligations.

Acting as a secondary point of contact for third-party providers, pension plan members, participants and internal stakeholders, the Pension Fund Specialist will facilitate smooth operations, maintain accurate records, support financial and technical reporting to the European Commission and contribute to policy and content development in a number of fields.

Duties and Responsibilities

- **Meeting coordination and documentation:** Prepare agendas and documents for Daily Management Committee (DMC) meetings, Board meetings and General Assembly meetings. Record decisions taken, prioritise and follow-up on action points.
- **Pension fund documents:** Draft or update pension fund documents i.e. pension plan rules, Financing Plan, request forms and member guides when a new employer joins the pension fund or when regulatory changes trigger amendments.
- **Internal communication:** Maintain communication with team members and internal stakeholders to keep them informed of relevant updates and attention points.
- **External stakeholder management:** Serve as the secondary contact for external partners and service providers (pension administrator, asset manager, technical and legal experts, compliance officer, accountant, risk manager, etc.), ensuring smooth communication and service delivery of these parties. Provide inputs for annual reports prepared by key controlling functions.
- **Inquiries management:** Respond to inquiries and manage technical correspondence with fund members, plan participants, prospects, service providers and external stakeholders.
- **Grant reporting:** Support preparation of progress reports on grant milestones and deliverables. Track budget variations and prepare financial and technical reports.

Equity, Diversity and Inclusion (EDI)

RESAVER is committed to building a diverse, equitable and truly inclusive work place. The postholder is required to comply with appropriate legislation and the RESAVER Gender Equality Plan.

Ethics

The postholder is responsible to work in compliance with any legislative and professional requirements.

Person Specification

This section lists the essential and desirable requirements needed in order to do the job. Applicants will be shortlisted on the extent to which they meet these requirements.

Knowledge and Experience

Required

- A bachelor's or master's degree in the field of economics, business, HR, management or equivalent professional work experience.
- Demonstrable knowledge of pension funds and pension products.
- Excellent numerical and analytical skills.
- Excellent knowledge of Microsoft Office: Word, Excel, PowerPoint and Outlook.
- Good command of written and spoken English which is the primary language of communication at RESAVER.

Communication

Required

- Ability to communicate in a diplomatic, tactful and courteous manner with a wide variety of people, at all levels.
- Ability to convey technical information to stakeholders who might have only basic understanding of the subject matter.
- Experience in drafting documents, reports and presentations to a high standard for a variety of audience.

Teamwork and Motivation

Required

- Able to work independently and effectively from a remote location in home office in a mostly virtual environment.
- Evidence of working pro-actively and supportively with higher management.

Service Delivery

Required

- Evidence of a customer-focused approach, appreciating the needs of different groups.
- Evidence of enhancing efficiency where information is accurately and promptly shared with internal and external parties.

- Experience of effective time and task management and delivering to agreed deadlines.

Initiative and Problem Solving

Required

- Hands on, pragmatic mind-set.
- Evidence of evaluating options, identifying effective courses of action and taking initiative to solve problems.
- Ability to make constructive recommendations for improvement of systems and procedures and see them through to implementation.

Planning and Organisation

Required

- Ability to prioritise workload, managing a number of tasks effectively and accurately, maintaining attention to detail at all times.
- Proven financial management skills and experience of tracking KPIs and budgets.
- Ability to translate complex processes to small milestones and follow them through until completing and interfere if necessary.