Defined Benefit Plan Administrator

Position Purpose:

The primary responsibility of this position is to support our defined benefit/cash balance plan clients. The Defined Benefit Plan Administrator will be directly responsible for helping to coordinate annual requirements related to their assigned clients' plans. The Defined Benefit Plan Administrator will be proactive and take responsibility in providing expertise by identifying and resolving client issues and providing value-added client consulting.

Essential Duties and Responsibilities:

- Maintain and continue to develop detailed knowledge and understanding of retirement plan rules and our company's product offerings.
- Consistently provide exemplary customer service in a professional, proactive manner through clear and concise communication.
- Develop and maintain effective working relationships with team and internal departments to provide exceptional service for our clients. Successfully identify, record, and monitor assigned items; communicate to team promptly for delegation of responsibilities.
- Help manage specific vendor relationships on behalf of clients and partners.
- Proactively review the status of assigned plans and their routine activity (compliance testing, 5500, quarterly statements, RMDs, etc.).
- Assess client objectives and future goals to suggest a plan, product, or functionality changes to improve results and reduce risks for our clients.
- Educate clients regarding our plan features, product capabilities, or our company's functionality and process.
- Provide training to members of the team as opportunities and experience arise.
- Perform other duties as requested and contribute to special projects as assigned or delegated.

Minimum Requirements:

- Bachelor's degree or comparable work experience.
- Working knowledge of cash balance/defined benefit plans & respective 5500 filings
- Minimum of 3 years of direct client contact and defined benefit plan experience or thorough knowledge.
- QKA designation recommended.
- Certification or working towards accreditation (ASPPA, CEBS, etc.) preferred.
- Proficient in Microsoft Office applications, specifically Word and Excel required.
- Excellent analytical and problem-solving skills.

- Working knowledge of retirement plans, ERISA, DOL and IRS regulations, and plan documents (individually designed and prototype).
- Excellent verbal and written communication skills desired. The ability and motivation to communicate effectively with clients and with other members of the team.
- Ability to work together in a small team environment.
- Ability to make sound professional judgments concerning issues that can create substantial financial and client relations liabilities for the company if mishandled.
- Ability to work extended hours from time to time to meet business needs and goals.
- Handle other essential tasks as assigned.

Job Type: Full-time

Salary: May very depending on experience

Supplemental pay types:

- Bonus pay

Education:

- Bachelor's (Preferred but not required)

Experience:

- Experience with Defined Benefit Plans: 3 years (Required)

Job Type: Full-time

Pay: $70,000.00 - $100,000.00 per year

Benefits:

- Flexible schedule
- Health insurance
- Professional development assistance

Schedule:

- 8 hour shift
- Monday to Friday

Education:

- Bachelor's (Required)

Experience:

- Defined Benefit Plan: 3 years (Required)

License/Certification:

- QKA Certification (Preferred)

Work Location: Remote