Retirement Plan Coordinator

Position Purpose:

The primary responsibility of this position is to provide support to our retirement plan clients and support our Defined Benefit Plan Administrators. This position should grow into a Defined Benefit Plan Administrator position. The Retirement Plan Coordinator will be directly responsible for coordinating annual requirements related to our client retirement plans. The coordinator 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 client relationships and support Defined Benefit Plan Administrators.
- 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.
- Perform other duties as requested and contribute to special projects as assigned or delegated.

Minimum Requirements:

- Bachelor's degree or comparable work experience.
- Minimum of 3 years of financial and/or client service support.
- 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.

- 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.
- Handle other essential tasks as assigned.

We are an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, age, protected veteran or disabled status, or genetic information.

Work Remotely

- Yes

Job Type:

- Full-time

Pay: $50,000.00 - $60,000.00 per year

Schedule:

- 8 hour shift
- Monday to Friday

Education:

- Bachelor's (Preferred)

Experience:

- Financial and/or customer support: 3 years (Preferred)
- Retirement finance industry: 3 years (Preferred)