Job Description

Transaction Specialist

Position Summary:

The Transaction Specialist works in a team environment and is measured by the accurate and timely processing of retirement plan distributions, loan requests, and contribution files. This position will be responsible for data entry and filing, as well as any internal projects assigned. The Transaction Specialist position requires strong organizational skills, attention to detail and exceptional time management.

Essential Functions:

- Complete processing, quality control, monitoring and confirmation of distribution and loan requests as well as any internal plan level distribution initiatives
- Achieve assigned goals related to turnaround times and accuracy, with attention to detail
- Support various year-end tasks, including delivery of proper notices and processing RMDs
- Assist with periodic reporting and follow-up for various projects and administrative support
- Work with providers to set up accurate transaction processing with plan sponsors
- Facilitate participant calls when appropriate
- Work with Retirement Plan Consultants to resolve loan & distribution issues
- Communicate significant issues and exceptions to an appropriate higher level of authority within the organization in a timely manner
- Other duties as assigned, e.g., database cleanup, office events, scanning & filing, and department support as needed.

Qualifications:

- Post-secondary education, or equivalent business experience
- Previous client service experience, preferably in an office management environment
- Advanced knowledge of MS Office Suite
- Builds and sustains relationships to work collaboratively and cooperatively as a member of a team
- Effective problem solving and communication skills
- Ability to manage change effectively