



# JOIN OUR TEAM!

**OPEN POSITION:** DC Retirement Plan Consultant

**LOCATION:** Laguna Hills, CA or Remote

## **PRIMARY RESPONSIBILITIES:**

- Manage and complete all aspects of administration of a caseload consisting of Defined Contribution Plans (80-100).
- Analyze provisions in plan documents to ensure compliance with IRS and DOL regulations.
- Confirm and analyze census information, determine eligibility, key, and highly compensated employees and input data.
- Calculate employer contributions including related nondiscrimination testing, coverage testing and other compliance requirements for more complex plans.
- Allocate employer contributions after considering top-heavy status, deductibility limits, and impact of forfeitures.
- Identify and communicate non-compliance issues to clients and make recommendations for correction.
- Identify issues related to fiduciary responsibilities, such as adequate bonding, impact of nonqualified assets on bonding, and prohibited transactions.
- Allocate gains and losses on pooled and individual accounts.
- Evaluate takeover plans and identify compliance issues.
- Prepare client reports and confirm accuracy of data.
- Communicate issues and recommendations for resolution to client.
- Review plan to make recommendations to client to maximize tax advantages or other benefits.
- Assist clients in establishing policies and procedures to communicate plan benefits to their employees.
- Support DOL, IRS and Account Audits, as needed.

## **REQUIREMENTS:**

- Competence in all areas of Defined Contribution /401(k) Plan administration
- Comprehensive and increasing understanding of complex plans.
- Sound knowledge of compliance requirements regarding employer contribution calculations, deduction limits, contribution deposit deadlines, top heavy determination, coverage testing, controlled groups and annual additions limitations.
- Knowledge of all aspects of distributions
- Understanding of IRS filing requirements and deadlines for qualified plans.
- Understanding of methods for researching DOL, IRS and other related regulations and procedures.
- Ability to effectively communicate, both in writing and orally, with a wide range of outside contacts in a professional manner.
- Maintain a positive attitude when addressing client questions and problems.
- Ability to work under pressure of deadlines and demanding clients.
- Work with minimal supervision.

- Good organizational skills and ability to set priorities consistent with Service Standards.
- Adjust priorities with changes in the annual business cycle of pension administration.
- Analytical and critical-thinking skills.
- Detail orientation.
- Excellent Interpersonal skills
- Demonstrates initiative.
- Good judgement.
- Software Skills: MS Office 2007--Excel, Word, Outlook; DATAIR, ft william, CMS, Adobe Acrobat

Minimum of two to five years of Defined Contribution administration experience requiring critical thinking, analysis, detail orientation, customer service and/or two to four years of college classes including accounting, math, and communications.



#### **HOW TO APPLY:**

Interested candidates should apply by submitting resume to [HR@egps.com](mailto:HR@egps.com).