



# JOIN OUR TEAM!

**OPEN POSITION:** Document Manager

**LOCATION:** Remote

The Document Manager works in a team environment and is measured by the accurate and timely preparation of plan documents, plan document amendments, and plan document restatements. The Document Manager requires strong organizational skills, attention to detail, and time management skills. This position will also be called upon to manage internal projects as needed.

## **ESSENTIAL FUNCTIONS:**

- Manage preparation of new plan documents from Plan Design Questionnaire (PDQ)
- Map client's current plan document provisions to PDQ, or review current document for protected benefits, when necessary
- Mentor and train document specialists and special project teams on document work
- Complete quality control review of amendments and new business documents
- Effectively communicate with new business consultants, sales consultants or retirement plan consultants as needed to clarify plan design or changes being made to the plan
- Monitor work trays in PensionPro to ensure completion of tasks within the prescribed turn-around time
- Lead document-related projects and manage project team (e.g., document restatements, interim amendments)
- Proactively manage development and updates to processes and procedures; including drafting of plan document communications
- Complete plan merger review analysis and summaries as assigned
- Maintain documentation on EGPS sponsorship of plan documents
- Serve as plan document liaison to Ft William on behalf of EGPS
- Attend training classes to grow knowledge and remain current with regulations and IRS guidance
- Monitor EGPS Plan Documents email box and respond to emails received
- Cross-train on compliance-related projects and tasks
- Prioritize and complete special compliance projects as assigned

## **QUALIFICATIONS:**

- Excellent verbal and written communication skills, including the ability to clearly communicate technical information
- Must possess strong organizational skills and attention to detail
- Must have knowledge of a variety of computer software applications in word processing, spreadsheets, and database software
- Self-starter who will take responsibility for completing tasks in a timely fashion
- Dependable with excellent follow-through on commitments and responsibilities

- Ability to work in fast-paced, ever-changing office environment
- Must be willing to maintain a flexible work schedule and work overtime as needed
- A minimum of 7 years in the retirement plan industry preferred
- Experience with Ftwilliam.com and PensionPro preferred
- Experience leading a team is preferred
- Experience with reading and understanding plan documents from various vendors is required

**HOW TO APPLY:**

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

