



# JOIN OUR TEAM!

**OPEN POSITION:** Document Specialist

**LOCATION:** Remote

The Document Specialist 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 Specialist requires strong organizational skills, attention to detail, and time management skills. This position will also be called upon to complete internal projects as needed.

## **ESSENTIAL FUNCTIONS:**

- Prepare 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
- Prepare plan document amendments as assigned
- Prepare plan document amendment packages for delivery
- 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 complete tasks within the prescribed turn-around time
- Prepare restatement documents as assigned
- Assist with document project work (e.g., document restatements, interim amendments)
- Proactively participate in development and updates of processes and procedures
- 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 2 years in the retirement plan industry preferred
- Experience with Ftwilliam.com and PensionPro preferred

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