EGPS
ECONOMIC GROUP
PENSION SERVICES

JOIN OUR TEAM!

OPEN POSITION: New Business Consultant

LOCATION: Remote

The New Business Consultant will work directly with the sale consultants, financial advisors, clients, and Document Specialists. This position requires strong organizational skills, attention to detail, exceptional time management and plan design experience. The New Business Consultant will be measured on their ability to accomplish tasks as assigned accurately and timely, and to provide a smooth transition of new plans from the sales consultants to retirement plan consultants.

ESSENTIAL FUNCTIONS:

- Own the installation process of a new plan
- Answer questions from sales consultants on plan design and administration
- Communicate products and services offered by EGPS
- Build and maintain relationships with financial advisors
- Hold welcome call with client and financial advisor
- Quality check plan documents to ensure they are drafted based on completed Plan Document Questionnaire
- Clearly communicate with sales consultants and clients to address any plan design questions
- Provide smooth transfer to Retirement Plan Consultant
- Achieve assigned goals related to turnaround times and accuracy
- Provide support for incoming and outgoing communication with prospective clients
- Communicate significant issues and exceptions to an appropriate higher level of authority within the organization in a timely manner
- Manage case load effectively to meet departmental service goals and partner-specific service levels for quality and timeliness
- Attend continuing education classes to stay current with regulations and law changes
- Work requires continual attention to detail in reviewing materials, managing multiple projects, establishing priorities and meeting deadlines

QUALIFICATIONS:

- Excellent verbal and written communication skills, including the ability to communicate technical information
- Must possess strong organizational skills
- 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
- Strong conceptual and analytical skills

- Ability to work in a team environment as well as independently, as appropriate
- Ability to work in a fast paced, ever changing office environment
- Must be willing to maintain a flexible work schedule and work overtime as needed
- A minimum of 4 years of retirement plan administration experience or equivalent preferred
- B.A. or B.S. in business, accounting or finance preferred, or equivalent business experience
- Previous client service experience; preferably in a professional environment

HOW TO APPLY:

Interested candidates should apply by submitting resume to HR@egps.com.