

**OPEN POSITION: 3(16) Retirement Plan Consultant**

**LOCATION: Nationally - Remote**

**POSITION SUMMARY:**

The 3(16) Retirement Plan Consultant will be responsible for the completion and oversight of plan administration tasks including, but not limited to: compliance testing, calculation and review of plan contributions, notice delivery, document review, and service communications. The individual filling this role will be the primary service contact for EGPS 3(16) Fiduciary Services clients, and requires strong organizational skills, attention to detail, and exceptional time management.



**ESSENTIAL FUNCTIONS:**

- Provide high level service to clients, participants, and advisors
- Interpret plan documents to ensure compliance with IRS and DOL regulations
- Review census information to determine eligibility, and key and highly compensated employees
- Develop and own communication structure for newly eligible participants
- Develop and own communication structure for ongoing participant notices
- Assist clients in establishing policies and procedures to communicate plan benefits to their employees
- Review payroll to determine timeliness of deposits and accuracy of contribution calculations
- Assist in the calculation of employer contributions related to nondiscrimination testing, coverage testing, and other compliance requirements
- Review and approve distributions, loans, and rollover contributions
- Administer the plan's mandatory force-out policy
- Review and approve any/all compliance testing and required reporting including, but not limited to: Form 5500, 8955 SSA, 1099R, and 945
- Identify issues related to fiduciary responsibilities, such as adequate bonding, impact of nonqualified assets on bonding, and prohibited transactions
- Prepare client/end-user reporting and confirm accuracy of data
- Communicate issues and recommendations for resolution to clients
- Review plan to make recommendations to clients for maximizing tax advantages or other benefits
- Evaluate takeover plans and identify compliance issues
- Support DOL, IRS, and account audits, as needed

**QUALIFICATIONS:**

- Minimum of 2 to 5 years of Defined Contribution administration experience requiring critical thinking, analysis, detail orientation, customer service and/or 2 to 4 years of college classes, including accounting, math, and communications
- Competence in all areas of Defined Contribution/401(k) plan administration

- Comprehensive understanding of complex plans
- Sound knowledge of compliance requirements regarding employer contribution calculations, deduction limits, contribution deposit deadlines, top heavy determinations, coverage testing, controlled groups, and annual additions limitations
- Software Skills: MS Office 2007--Excel, Word, Outlook; DATAIR, ft william, CMS, Adobe Acrobat
- 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, in a professional manner
- Maintains a positive attitude when addressing client questions and problems
- Ability to work under pressure of deadlines and demanding clients
- Ability to work with minimal supervision
- Good organizational skills and ability to set priorities consistent with service standards
- Ability to adjust priorities with changes in the annual business cycle of pension administration
- Analytical and critical-thinking skills
- Excellent interpersonal skills
- Demonstrates initiative and good judgement

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

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