ECONOMIC GROUP PENSION SERVICES

JOIN OUR TEAM!

OPEN POSITION: DC Retirement Plan Consultant II

LOCATION: Nationally - Remote

POSITION SUMMARY

Responsible for the administration of retirement plans. Maintains plan records and ensures compliance with federal regulations. Creates and maintains positive relationships with clients, financial advisors, and service professionals. Must be able to work in a team environment to support clients and other EGPS departments. Retirement Plan Consultants (RPCs) will be evaluated on their ability to retain their block of business while meeting service and processing goals as defined by leadership. This role is responsible for complete oversight of the plan administration and must possess strong relationship skills to provide excellent client service and retention.

PRIMARY RESPONSIBILITIES:

- Ensure timely review and delivery of annual compliance testing, contribution calculations, and governmental forms filings, while maintaining accuracy of data in client relationship management system for use in managing plan load and reporting.
- Communicates with customers and assists with benefit distributions.
- Demonstrate an excellent level of proactive client focus and teamwork with clients, advisors, CPAs, and internal partners.
- Responsible for protecting, securing, and handling of all confidential data transmitted to/from EGPS.
- Consult on plan design options to plan sponsors as needed.
- Develop, maintain, and strengthen relationships with clients, advisors & CPAs.
- Interface with recordkeeping providers to ensure a positive client experience.
- Develop technical skills to become a subject matter expert in regulatory and industry practices.
- Communicate significant issues and exceptions to an appropriate higher level of authority within a timely manner.
- Reviews distributions within a timely manner.
- Self-motivated to track upcoming deadlines and follow up with clients consistently for data or additional information.
- Follows EGPS policy and procedures to ensure a uniform product and process for all clients.
- Assist internal departments, as needed, with plan administration.

REQUIREMENTS:

- Bachelor's degree or equivalent work experience.
- 6+ years of related experience in plan administration.
- Industry-related credentials (ASPPA or NIPA) preferred.
- Proficient knowledge of Microsoft Office Suite products and systems.
- Proven competency in reading and interpreting retirement plan documents with a solid understanding of related rules and regulations.
- Effective collaboration, problem solving, and organizational skills.

- Excellent verbal/written communication skills as well as attention to details.

FLSA Status: Exempt

HOW TO APPLY:

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

**This job description may not be inclusive of all assigned duties, responsibilities, or aspects of the job described, and may be amended at any time at the sole discretion of the Employer.*

Date Revised: 11.2023
DOE and Location: 75-110k