



# JOIN OUR TEAM!

## **OPEN POSITION:** Transaction Specialist

## **LOCATION:** Nationally - Remote

Performs various data processing tasks related to handling retirement plan accounts. Reviews and analyzes transactions, including vesting verifications, participant eligibility for the requested transaction, and timing of distributions. May assist in other related administrative or support activities, including interfacing with quality assurance professionals or researching data errors.

## **PRIMARY RESPONSIBILITIES:**

- Complete distribution processing adhering to EGPS policy and procedures, monitoring and confirmation of distribution and loan requests and any internal plan level distribution initiatives.
- Achieve assigned goals related to turnaround times and accuracy, with attention to detail.
- Support various year-end tasks, including preparing Form 1099-R forms, Force-Out & Plan Termination campaigns, and processing RMDs.
- Assist with periodic reporting and follow-up for various projects and administrative support.
- Work with providers to set up accurate transaction processing with plan sponsors.
- Facilitate participant communication (phone calls and email) when appropriate.
- Knowledge of different retirement plan investment accounts: Pooled trustee directed accounts, self-directed brokerage accounts and accounts held at a recordkeeper.
- Preparation of distribution directives (letter of instructions) for non-recordkeeper accounts.
- Process distributions, 1099Rs, plan terminations, and force-outs through Penchecks Trust Co. for non-recordkeeper distributions.
- Work with Retirement Plan Consultants to resolve loan & distribution issues.

## **REQUIRED QUALIFICATIONS:**

- Bachelor's Degree (preferred), high school diploma or equivalent and additional experience may substitute.
- 3-5 years of industry related experience, including 1-2 years in an Operations Specialist role (or equivalent) with a focus on customer service.
- Experience with data analysis, process implementation, and reporting.
- Effective communication, organizational and time management skills.
- Proficiency with Microsoft Office Suite and the ability to learn new software quickly.

## **FLSA Status:** Non-Exempt

## **HOW TO APPLY:**

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