Job description

As a Client Services Coordinator you will interact with staff of our firm and act as contact for retirement Plan Sponsors. This position is highly interactive and client facing. It’s a great opportunity to learn our industry and develop skills for advancement.

Here is list of typical responsibilities

Client Services

• Responsible for the management and distribution of incoming calls.

• Respond to Plan Sponsor, Advisor and Participant inquiries regarding routine items, research client issues and resolve service issues/errors while demonstrating a proactive, solution-based approach. Refer complex questions to Plan Administrators or Consultants as assigned.

• Ability to build and maintain strong client relationships.

• Responsible for general administrative duties such as filing, scanning, ordering supplies and mailing/shipping.

• Build and maintain effective internal working relationships and support teamwork in meeting company goals.

• Assist in special projects as and perform other duties as needed.

• Data input and processing of address, census, payroll and loan transactions, funding corrections and vesting uploads.

• Update vendor platforms for integrations with plan and TPA Procedures and expenses.

• Assist Advisors with processing incoming rollover requests.

• Preparation of year-end census gathering spreadsheets for TPA clients as well as handling the year-end data requests.

• Assist with completion of Plan Terminations and De-Conversions.

• Maintain/track workflow for; processing, client communication, Form 5500 filing and any other time-oriented items assigned.

• Assist Distribution/Loan Specialists with processing related items and provide back-up as needed.

• Assist in the collection and distribution of new client data, vendor contract paperwork.

Requirements

• College (or Associates) degree preferred.

• Strong verbal and written communication skills.

• Ability to handle multiple projects simultaneously.

• Willingness to learn and grow.

Job Type: Full-time

Pay: $18.00 - $20.00 initial per hour with available bonuses. Paid Time Off and Holiday pay, health/dental/vision insurance and 401(k) plan with company contributions.

Daniel McWhirter

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