

Recent Placement Highlights

Candidate Summaries of JLA 2.0 Placements over the last 6 months

NE:Northeast – SE:Southeast – MW:Midwest – SW:Southwest – NW:Northwest – WC:West Coast

MW1 - ACCT MGR/COMPLIANCE - \$80K

6yrs TPA experience with 4yrs as Compliance Analyst and 2yrs as Plan Administrator. Compliance Testing, 5500's. Exp w/ASC, Relius, ftwilliam and PensionPro. Placed at MW TPA.

SW1 - 401(k) PLAN ADMINISTRATOR - \$75K

18yrs of Ret Plan industry experience. Responsible for 86 DC plan administration, DB plan design and compliance testing. Proficient with Relius software. Placed at SW TPA.

NE2 – SR. DC ADMINISTRATOR - \$110K

20+yrs of A-Z DC plan administration exp, including contributions, loans, distributions, terminations & withdrawals. Extremely proficient with Datair software. Placed at NE TPA.

NE3 – PENSION ADMINISTRATOR - \$50K

1.5yrs of TPA exp. processing distributions, loan paperwork, calculate vesting, census checks, complete 5500's, 8955's. Series 65 license and Relius experience. Placed at NE TPA.

MW3 – TRANSACTION COORDINATOR - \$63K

3yrs TPA exp in DC, DB, Cash Balance and MEP plans transactions. IRS/DOL deadline expertise. Detail oriented, financial report analysis. Exp with PensionPro, ftw and Relius. Placed at MW TPA.

WC3 – PLAN CONSULTANT - \$83K

AKS, APA w/7+yrs exp. Full admin 125 plans incl. audited, 401(k), PS, New Comparability, 403(b), Cross Tested DC, DB/DC Combo plans. Proficient w/ftw, ASC, Relius, PenPal. Placed at WC TPA.

MW4 – RET PLAN ADMINISTRATOR - \$90K

ERPA, QPA, APA designations. 25+yrs exp A-Z plan administration w/401(k), DB, 403(b), CB, ESOP, Safe Harbor and Cross Tested plans. Exp w/ASC, Relius, Datair, ftw. Placed at MW TPA.

NE1 - SR. PLAN ADMINISTRATOR/MGR - \$95K

QKA with 20+yrs of A-Z plan administration exp including 10yrs recordkeeping, 12yrs compliance/plan consulting with strong Relius proficiency. Placed at NE TPA.

MW2 - CHIEF FINANCIAL OFFICER - \$105K

CPA with nearly 20yrs of corporate accounting experience, most recently with top-tier TPA. Hired to implement accounting processes & procedures to enable future growth. Placed at MW TPA.

WC1 – PLAN CONSULTANT - \$71K

2.5yrs Plan Administration exp including compliance testing, 5500's valuation reporting, census & asset reconciliation, contributions. Relius & ftwilliam. Placed at WC TPA.

NE4 – COMBO PLAN ADMINISTRATOR - \$105K

ASPPA QKA. 9yrs primary contact for 200+ DC&DB plans. Currently manages 100+ ERISA plans. Passed SOA/CAS Exams P/1 & FM/2. Excel & ftwilliam expert. Placed at NE TPA.

WC2 – RET PLAN ADMINISTRATOR - \$91K

6yrs retirement plan exp administering DB, DB/DC Combos, 401(k), Profit Sharing, Cross-Tested plans. Plan design with CB expertise incl non-discrim testing. Datair exp. Placed at WC TPA.

WC4 – ENROLLED ACTUARY - \$200K

EA, APA w/18+yrs of ret plan administration exp w/last 15 focused on smaller sized plans. Signing actuary and review for DB, Floor/Offset & CB Plans. Relius, ASC, ftw exp. Placed at WC TPA.

MW5 – COMPLIANCE/DOCS/REVIEW - \$100K

QKA w/20+yrs TPA exp and current Compliance expert. Testing includes: ADP/ACP, 402(g), 415, 414(s), Top-Heavy for 401(k), 403(b) 457 plans. Adoption Agreements, SPD, Amendments and SMM's. ASC expert user. Placed at MW TPA.

*To Inquire about similar candidates, please reference the 3-digit code
and Call 480.251.2989 or email – headhunter44@cox.net*