Current Available Searches

As of 7/08/24

CST1: DB/DC COMBO ADMINISTRATOR (Remote)

- Must have A-to-Z DC Administration experience.
- Communicate directly with clients to ensure census and plan information is received.
- Perform annual testing (ADP/ACP, 402(g), Top Heavy determination, 410(b) etc.).
- Prepare and complete annual valuations and government forms (Form 5500, 8955-SSA, etc.).
- Prepare annual DB valuations.
- Plans include DB, Cash Balance and DB/DC Combo.
- 3+ years prior TPA experience preferred.
- Experience with Datair pension plan software.
- **Similar position available in EST time zone.**

PST1: DB/DC COMBO ADMINISTRATOR (Remote)

- Must have A-to-Z DC Administration experience.
- Communicate directly with clients to ensure census and plan information is received.
- Perform annual testing (ADP/ACP, 402(g), Top Heavy determination, 410(b) etc.).
- Prepare and complete annual valuations and government forms (Form 5500, 8955-SSA, etc.).
- Prepare annual DB valuations.
- Plans include DB, Cash Balance and DB/DC Combo.
- 3+ years prior TPA experience preferred.
- Experience w/ASC and ftwilliam pension plan software.

CST2: DIRECTOR OF TRANSACTIONS (Remote)

- 3+yrs Managing a team of 8+ in the retirement industry.
- Expertise with Distribution, Loan, Plan Termination, QDRO, Refund Distribution Requests and F1099 processing.
- Plan Document review and Recordkeeper knowledge is a plus.
- Time management focus, with attention to detail, deadlines, and customer service needs.
- Strong commitment to proactively managing workload according to IRS/DOL deadlines.
- Quality Review of transactions completed by the team.
- Previous experience supervising management level personnel is a plus.
- Experience with PensionPro & ftwilliam is a must.

PST2: SENIOR DEFINED BENEFIT PLAN ADMINISTRATOR (Remote)

- Must have A-Z Administration of smaller DB Plans.
- Manage client relationships.
- Working knowledge of Datair pension plan software.
- 5+yrs of experience in DB Administration.
- Consulting with clients on plan design and documentation, participant communications.
- Experience with Audited and Non-Audited plans.
- Several years prior TPA experience preferred as they can go to $110K for the “perfect” candidate.

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PST3: DEFINED BENEFIT PLAN ADMINISTRATOR (Remote)

- 3+yrs of experience in DB Administration
- Must have A-Z Administration of smaller DB Plans.
- Coordinate annual requirements of assigned clients' plans.
- Identify and resolve client issues and provide value-added client consulting.
- Review status of assigned plan and routine activity including compliance testing, 5500, quarterly statements, RMD's, etc.
- Ability to suggest a plan, product, or functionality change to improve results and reduce risks for the clients.
- Educate clients on plan features, product capabilities and company's functionality and process.

PST4: DC RETIREMENT PLAN ADMINSTRATOR (Remote)

- 5+ years prior TPA experience preferred.
- Must have A-to-Z DC Administration experience.
- Communicate directly with clients to ensure census and plan information is received.
- Perform annual testing (ADP/ACP, 402(g), Top Heavy determination, 410(b) etc.).
- Prepare and complete annual valuations and government forms (Form 5500, 8955-SSA, etc.).
- Experience with Relius and ftwilliam software is required.
- Must have experience with Audited plans.

EST1: RETIREMENT ANALYST (Remote)

- 2+yrs experience working with a TPA preferred.
- Gather/analyze census data to determine participant eligibility.
- Collect/compile data from multiple investment platforms. Reconcile trust assets.
- Produce standard and ad hoc client reports.
- Prepare required government forms, schedules, and attachments.
- Prepare notices, disclosures, and statements.
- Experience with Relius and ftwilliam pension software is a plus.

EST2: SENIOR RETIREMENT ANALYST (Remote)

- 4+yrs experience working with a TPA preferred.
- Gather/analyze census data to determine participant eligibility.
- Conduct contribution calculations while ensuring compliance with regulations. Identify and resolve discrepancies.
- Collect/compile data from multiple investment platforms. Reconcile trust assets to participant accounts.
- Produce standard and ad hoc client reports. Prepare required government forms, schedules, and attachments.
- Generate notices, disclosures, certifications, and statements. Process distribution requests or reviews output of less experienced staff. Verify vesting and calculate amounts available for loans and hardships.
- Serve as a technical resource to the DC team.
- Experience with Relius and ftwilliam pension software is a plus.

To Inquire – Call 480.251.2989 or email – headhunter44@cox.net

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EST3: DC RETIREMENT PLAN CONSULTANT X 2 (Remote)
- Must have A-to-Z DC Administration experience.
- Communicate directly with clients to ensure census and plan information is received.
- Perform annual testing (ADP/ACP, 402(g), Top Heavy determination, 410(b) etc.).
- Prepare and complete annual valuations and government forms (Form 5500, 8955-SSA, etc.).
- Be very familiar with any of the following Pension software: Datair, ASC, Relius, FT William, Pension Pro, etc.
- Salaries range from 45K to 95K so years of prior TPA experience will be a primary factor in where you are slotted salary-wise.
- A QKA or any other professional designation is always a plus.

CST3: CLIENT RELATIONSHIP MANAGER (Near Minneapolis/Travel)
- 5+yrs experience handling large book of DC business in Minnesota.
- Work in tandem with Plan Consulting, Participant Education and Fiduciary Services teams to cultivate lasting and meaningful client relationships.
- Educate, train, coach and mentor clients on client's systems, and products and services.
- Must have experience in issue resolution, fee negotiations, and investment related matters as they arise.
- Maintain detailed knowledge of client's products and services, with the ability to effectively communicate these programs to clients and financial industry partners.
- Participate in identifying cross selling opportunities for client related products and services.

EST4: ENROLLED ACTUARY (EA) (Onsite)
- Perform and review valuations for defined benefit (including cash balance) and profit sharing (including 401k) plans.
- Perform and review compliance testing as required (e.g. ADP/ACP, 401(a), 410(b) etc.).
- Prepare and review government filings (including 5500 series, PBGC, 8955-SSA, etc.).
- Must have (EA) designation.
- Must have small plan (under 100 participants), DB and DC experience.

CST4: DEFINED BENEFIT PLAN ACTUARIAL ASSOCIATE (Remote)
- 3+yrs administering/consulting on small to mid-size cash balance plans.
- Perform and review actuarial valuations for defined benefit and cash balance plans.
- Prepare and review non-discrimination testing for qualified pension plans including Cash Balance, Defined Benefit, 401(k), Profit Sharing, and Money Purchase plans.
- Prepare and review PBGC filings and notices.
- Prepare and review annual FASB reports.
- Prepare and deliver government form filings (5500's, Schedule SB).
- Experience with ftwilliam software would be a plus.

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