Wealth Management Firm Seeks Dynamic Financial Planner to Manage Growing 401(k) Plan Division

Title: Manager, Retirement Plan Services

Reports to: Managing Director, Advisory Services

Benefits: Yes

Status: Full Time

Date: December 2012

Job Summary

The Manager of Retirement Plan Services will maintain existing retirement plan client relationships through serving Plan Sponsors (business owners and managers) as well as Plan Participants (employees). The position requires significant proactive client contact and organization to handle multiple tasks is essential. The ability to work in a team environment to provide an outstanding client experience is also important. The position will be responsible for developing as well maintaining workflows and processes to manage our retirement plan business.

Duties and Responsibilities

Manager, Retirement Plan Services can expect to focus their work in the following areas:

- Client relationship development and management for The Joseph Group's existing group retirement plan sponsors, including ongoing and regular client contact and communications
- Lead effective/strategic meetings with plan sponsors and consult directly with clients' executive/HR team
- Conducting participant enrollment and educational meetings which will often involve large group presentations
- Further develop and maintain processes and procedure to manage our group retirement plan business
- Establish as well as maintain plan sponsor review and participant education schedules

- Coordinate with third-party administrative firms to service clients' operational needs (i.e., loans, distributions, terminations)
- Work within the team framework to further develop and enhance our open architecture retirement plan platform
- Integrate into The Joseph Group's team environment and participate in The Joseph Group's teams to help achieve firm goals

Qualifications

The Client Advisor position typically requires the following qualifications:

- Minimum 1-3 years experience in advisory, wealth management or retirement plans with demonstrated ability to manage client relationships
- Bachelor's Degree from an accredited college or university
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook. Must learn Junxure CRM software
- Group retirement plan acumen, judgment and experience
- Demonstrated problem solving skills
- Strong organization and time management skills with attention to detail
- Excellent communication, listening, and relationship building skills
- Excellent speaking and group presentation skills
- A passion for caring for clients through their finances
- A team player in The Joseph Group's "Best Places to Work" culture
- Desire/ability to work successfully in a small company environment
- Proactive, self-motivated personality

Salary and Benefits

Pay/benefits are competitive based on industry standards.

- Salary will be based on experience
- Benefits include health care, 401(k)
- Partial and/or full financial support for professional accreditation/continuing education requirements and other education/training opportunities

The Joseph Group is an Equal Opportunity Employer

Contact

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