

Job Description

Job Title: Retirement Services Specialist
Reports to: Retirement Services Team Lead
Location: Corporate Office (Houston, TX)

Position Description:

Will assist with full service, third-party administration for non-ERISA, employee benefits including IRS Section 457 deferred compensation plans, 403(b) tax-deferred annuity plans and Section 3121. Work the K- 12 Market in 7 states. Through telephone and email communications work to ensure plan compliance for plan participants, employer groups and carrier vendor partners.

Qualifications

- No Experience Needed.
- Strong customer service skills and a proven track record of handling sensitive client information.
- Must have proven oral and written communication skills through work.
- Must have intermediate knowledge and work experience using Excel, Word & Outlook.
- High school diploma required or equivalency required (GED).

Preferred Qualifications

- 2-3 years work experience in retirement plan benefit administration
- Knowledge of general retirement plan terminology highly preferred
- Knowledge of the K-12 market benefits highly preferred

Knowledge, Skills and Abilities

- Intermediate proficiency with Microsoft Office Suite, including Excel
- Time management and organization skills
- Computer proficiency
- Communication skills and general business acumen
- Strong sense of urgency
- Superior phone skills working with plan participants
- Strong interpersonal skills; diplomatic and tactful

Must be able to obtain and maintain security clearances and successfully complete a thorough background check.