Client Services Associate

Seattle, WA | **Full Time** (40 hours/week) | **Start Immediately** | **$18-$23/hour**

At Leading Retirement Solutions (LRS) our mission is to empower all businesses with the economic independence required to help their employees save for a secure retirement. In order to deliver on this mission, LRS team members uphold their commitment to superior customer service, have a consistent track record of exceeding expectations, and always show their attention to detail by continually advancing their education of our unique industry. With their solutions-oriented mindset and ability to thrive both independently and as part of a team, LRS is able to leverage our strengths and promote innovation throughout our industry. If this aligns with your values, and you possess the skill set to thrive in a fast paced and often changing work environment, we would love for you to join our organization of experts!

We implement 401(k)s, 403(b)s, Defined Benefit Plans, SEP & Simple IRAs, ROBS, ESOPS, Church Plans, and even plans for Cannabis companies. Through our open architecture recordkeeping services, we provide investment advisors, managers, plan sponsors and participants access to traditional and non-traditional investments.

Department Responsibilities

The Client Services team communicates directly with our clients in an effort to understand their experiences with our company, discuss the services we provide, and assist in any addition requests they may have. Team members respond to client questions regarding their retirement plans, discuss expectations on meeting regulatory requirements, and collaborate with other departments to resolve client issues.

In Your Role

- Consulting with plan sponsors, assisting with optimal plan design for the highest profitability of a retirement program
- Drive Customer behavior by providing support to clients, including making outbound phone calls/email campaigns to obtain outstanding agreements, documents, information and outstanding invoices
- Working closely with clients to identify and reach the goals set for their retirement plans
- Develop and maintain the client implementation and termination process, workflow improvement initiatives, and program/policy changes
- Assessing and monitoring the quality of clients' retirement programs
- Maintaining a vast knowledge of ERISA and Internal Revenue Code
- Advise clients on all technical, regulatory, and administrative issues and work with administrative team on solutions
- Soliciting new business referrals and independently generate relationships with outside sources for new business development through personal and professional networking
- Analyzing client accounts for possible revenue earning opportunities

Qualifications

- Work Authorization: U.S. Citizen or Permanent Resident Visa.
- Bachelor's Degree and a minimum of 2 years financial services or investment industry experience.
- ASPPA Retirement Plan Fundamentals (RPF) Certified.
- Consultant or Advisory Credentials from ASPPA, fi360, or other investment related institutions.
- Strong command of technology and the ability to quickly learn new software solutions.
- Proficiency is required with Excel, Word, Outlook, Adobe Acrobat, browsing network directories, basic calculations, and dual screens as we are a paperless office.

To Apply: Email Human Resources - careers@leadingretirement.com
Be sure to include a cover letter, resume, references, and any additional information.

Benefits We Offer

We offer benefits including Medical, Dental, Vision and Accident after 60 days of employment. Paid Time off (PTO) and Paid Holidays are available after 90 days of employment. We also offer a company sponsored 401(k) Plan and company matching contributions, performance bonuses, and financial support for ongoing education and credentialing. We are a growing company with a casual working environment, providing each of our team members the opportunity to be a part of our company's success.