LEADING RETIREMENT SOLUTIONS
BE THE LEADER. PLAN FOR THE FUTURE.

Retirement Plan Administrator

Seattle, WA (Remote capability) | **Full Time** (40 hours/week) | **Start Immediately** | **Pay: Based on Experience**

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 Administration & Recordkeeping team supports all aspects of Plan Administration including trading activities, participant support, and sponsor interaction. Team members communicate with plan sponsors, participants and referral partners to develop and direct the implementation process, improve workflow processes, make program and policy changes, and meet regulatory requirements.

In Your Role

- Support daily and balance forward defined contribution and defined benefit plans.
- Daily trading and reconciliation.
- Contribution processing and reconciliation, including payroll contribution files.
- Distribution and loan processing.
- Review Match calculations, fund notices, and other trading transactions to ensure accuracy and completion.
- Set up outgoing & incoming rollovers for plan participants, including working with participants and banks while communicating progress with the client.
- Enrollment, contribution, and investment allocation set up for participants.
- Customer support, including answering phones and email inquiries.
- Review plan documents and understand retirement plan provisions.
- Monthly and quarterly fee processing.
- Create online accounts for each customer, including uploading documents, deliver account login information, and monitor utilization.
- Assist with plan conversions and deconversions.

Qualifications

- Work Authorization: U.S. Citizen or Permanent Resident Visa.
- Experience with company sponsored retirement plans and/or the financial services or investment industry is preferred.
- Accounting, bookkeeping or finance background preferred, ideally with experience in daily recordkeeping or trading.
- Experience with Investlink/SRT is preferred.
- ASPPA RPF 1, ASPPA RPF 2, ASPPA DC 1, ASPPA DC 2 certifications preferred.
- Being deadline driven, with high attention to detail and accuracy is critical in this role.
- Strong command of technology and ability to learn new software solutions easily and quickly.

To Apply: Email Human Resources - careers@leadingretirement.com
Please send a resume and any additional applicable 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.