



401K Generation is a Registered Investment Advisory firm providing financial and fiduciary services to employer sponsored 401(k) plans and private wealth management services to individuals. As a 3(16) Plan Fiduciary, we manage the day-to-day administrative tasks for 401(k) plans nationwide. We are committed to helping individuals prepare for their financial future and relieving businesses across America of the administrative burdens of a 401(k) plan. We hold ourselves accountable and pride ourselves on delivering uncomplicated and innovative retirement plan solutions. This dynamic, fast-growth company is seeking a Client Operations Support Specialist to join our team and grow with us.

Job Title: Client Operations Support Specialist

Report to: 5500 Manager/Notices and Disclosures Supervisor

Status: Full Time/Non-Exempt

Position Summary:

The Client Operations Support Specialist will provide back-office support to 401K plan administrators and participants. The primary responsibilities for this role will be completing and distributing notices and disclosures via email and US mail, onboarding new clients, and assisting with form 5500 filings. Each of these tasks requires great attention to detail.

Job Description:

- Promote and adhere to the company's core values; Accountability, Communication, Commitment, Service Excellence, Integrity, and Collaboration
- Complete and distribute notices and disclosures to clients timely and accurately; via electronic processing and US mail
- Assist with onboarding new clients by completing CRM profile and distributing welcome packet
- Assist with Form 5500 filings
- Interact with plan sponsors and document each encounter with proper internal/external documentation in CRM
- Compose consistent professional communication
- Continually maintain knowledge of all company services
- Maintain and ensure confidentiality of plan and participant information
- Practice organization and time management skills including prioritizing work and requesting additional work when appropriate
- Pay close attention to deadlines
- Meet or exceed metrics on a consistent basis
- Act as backup to other positions as needed

Job Qualifications:

- Minimum two years' previous customer service experience required
- Experience sitting in front of a computer for entire shift
- Prior experience in the retirement plan industry with a focus in Defined Contribution Plans
- Must obtain Retirement Plan Fundamentals (RPF) certification within first year of employment
- Exceptional organizational skills, strong attention to detail and ability to multi-task

- Ability to work independently and also be part of a team environment
- Proficiency with Excel, Word and Outlook required. Salesforce experience a plus
- Availability to work shift schedules including evenings
- Flexibility to work mandatory overtime in order to meet business needs
- High school diploma or equivalent required
- Must be at least 18 years of age
- Must be authorized to work in the US
- Excellent verbal and written communication skills
- Ability to produce grammatically correct written correspondence
- Must be able to pass a criminal background check

Other Duties:

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.