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Service Level Planner & Retirement Plan Specialist

Financial Planner: ***(Service Level Planner)***

- Assist with maintaining a high level of service clients have come to expect and deserve
- Develop client meeting agendas
- Handle select client meetings on your own, or assist with joint meetings
- Prepare meeting summary email for clients
- Record meeting notes in our CRM (Redtail) to remain compliant
- Coordinate all planning, implementation and follow up service tasks
- Respond to client service requests as they arise same day or at a minimum respond within 24 hours
- Assume full responsibility for select clients where you are assigned as their primary contact
- Supervise any Support Advisors to assure proper follow up and follow through
- Begin to source new client relationships from current clients and your own personal connections
- Scan and organize client data and documents into their respective virtual vault as well as into their online folder *(u-drive)*

Retirement Plan Specialist:

- Take the lead on servicing current group retirement plans (primarily 401k) including;
  - Conducting participant education and enrollment meetings
  - Fielding participant questions as they arise
  - Benchmarking plans every 3 years, or more frequently if necessary
  - Handling employer related service requirements
  - Coordinating annual testing with TPA
- Take the lead on implementing new group retirement plans (primarily 401k) including;
  - Assisting with the design and ultimate selection of the new plan
  - Spreadsheeting comparisons of both plan designs and top providers
  - Educating the employer on the various plan alternatives
  - Handling the implementation of the new plan at the employer level
  - Coordinating the TPA to ensure a heightened experience
  - Conducting participant education and enrollment meetings
- Follow our WBD process for implementing and servicing plans
  - Suggest and make improvements to enhance our client satisfaction
- Maintain organized on-line and vaulted files for our records and the client's access
- Continue to educate yourself to remain current and cutting edge on new developments as they relate to group retirement plans
  - Meet with local wholesalers, TPAs and other related service providers
  - Stay up to date with specific tax law changes
  - Keep our group informed and current
- Keep our planning templates and vignettes current, relative, appealing and in compliance

Requirements:

- 3+ years in Financial Services
- Series 6 or 7
- Life & Health Insurance License
- Knowledge & understanding of 401(k)'s Plans
- Must be process oriented, detail driven with an extreme attention to follow-up and follow-through
- Self-Motivated

General:

- Remain in good standing with your licensing, continuing education, designations and general reputation within the company, our product partners and your community
- Attend Monday morning practice management meeting and be prepared to provide updates on status of your cases in motion
- Participate in various training venues; in person, webinars, conference calls, off-site meetings and overnight destination events
    - Symposium
    - Quarterly business planning

To apply for this opportunity, please email your resume and cover letter to Jason.Brito@WBD.Group