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 Support Specialist to join our team and grow with us.

**Job Title:** Client Support Specialist
**Report to:** Client Services Manager
**Status**: Full Time/Non-Exempt

**Position Summary:**
The Client Support Specialist will demonstrate consistent proficiency in customer service with an emphasis on responding to customer requests and resolving customer issues with utmost courtesy and professionalism. The incumbent will pay great attention to detail in researching requests, and in preparing and distributing notices and disclosures. This position requires schedule flexibility.

**Job Description:**

- Promote and adhere to the company's core values; Accountability, Communication, Commitment, Service Excellence, Integrity, and Collaboration
- Address plan sponsor and participant requests by telephone, email, or online (e.g. chat, social media)
- Document each customer encounter with proper internal/external documentation in CRM
- Assist participants with 401(k) plan inquiries
- Collaborate with the client support team and other departments to ensure thorough, timely resolutions are provided to clients
- 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
- Meet or exceed metrics on a consistent basis

**Job Qualifications:**

- Minimum one year previous customer service experience required; contact center experience preferred
- Prior experience in the retirement plan industry with a focus in Defined Contribution Plans preferred
- 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.