401k Generation

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 Strategic Relationship Manager – Bilingual to join our team and grow with us.

Job Title: Strategic Relationship Manager - Bilingual
Report to: Manager, Strategic Relationships
Status: Full Time/Exempt

Position Summary:

The Strategic Relationship Manager will be responsible for creating, developing, and owning relationships with vendor sales teams who sell and promote our services. This position will also serve as Account Manager providing client support to plans who reach platinum level asset value. The incumbent will oversee accounts from startup (or conversion) with a focus on retention through white glove service.

Job Description:

- Promote and adhere to the company's core values; Accountability, Communication, Commitment, Service Excellence, Integrity, and Collaboration.
- Increase revenue from vendor sales teams by building long-term relationships.
- Serve as Account Manager on assigned accounts.
- Support first call resolution for clients and participants of assigned accounts.
- Follow escalations through to resolution.
- Increase participation by facilitating enrollment meetings, educating potential participants on all aspects of their plan in English and Spanish
- Identify/report trends and/or systematic issues within client base as they become apparent and provide solutions and possible opportunities for growth.
- Create and increase credibility by demonstrating knowledge of 401(k) plans including plan design, regulations, and compliance.
- Represent company on conversions and facilitate the conversion process.
- Document each customer interaction with proper internal/external documentation in CRM.
- Ensure client calls are conducted over a recorded line.
- Role model outstanding customer service.
- Build inter-departmental relationships.
- Offer solutions to meet or exceed customer expectations.
- Ability to consistently meet KPI's including quota.

Job Qualifications:

- Bachelor's Degree or equivalent work experience required

- Broad knowledge of the retirement plan industry required, designation with ASPPA preferred
- Minimum 5 years' experience in a client support role required
- Minimum 3 years' experience in a sales role preferred
- Prior 401(k) plan experience required
- Experience in managing key accounts/relationships
- Demonstrated record of meeting individual objectives
- Strong interpersonal, presentation, and persuasion skills
- Excellent collaboration, organizational, time management, customer service and problem-solving skills
- Strong focus on customer service
- Exceptional verbal, written and visual communication skills in English an Spanish
- Ability to communicate effectively to all levels of internal and external contacts verbally and in writing
- Ability to maintain cooperative working relationships with all levels
- Ability to work both independently and as part of a team
- Strong client relationship building skills
- Ability to recognize basic procedural issues as they arise and escalate to the appropriate level
- Must be authorized to work in the US
- 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.