



# PENSION consultants inc.

## JOB DESCRIPTION

**Position:**

ERISA Consultant

**Department:**

ERISA Services

**Reports To:**

Director, ERISA Services

**Salary:**

Salary is commensurate with education and experience. All Pension Consultants, Inc. employees are salaried professionals.

**Overall Purpose:**

Responsible for serving as the primary relationship manager for corporate clients, which includes consulting, advising and educating plan sponsors and fiduciaries on technical ERISA statutory, regulatory and compliance issues.

**Duties & Responsibilities:**

- Manage client relationships in a manner that ensures client satisfaction and loyalty.
- Provide exceptional value to the client by delivering the services agreed to in the engagement.
- Serve as the primary point of contact for the client and facilitate access to other specialized areas of the firm when necessary and appropriate.
- Build relationships with key decision makers and establish yourself as a thought leader in the area of ERISA services.
- Thoroughly understand and be able to communicate the clients unique plan provisions to stakeholders.
- Work closely with other departments (Investment, Participant, Vendor) to provide a high level of client service.
- Organize and lead committee meetings to ensure the client is meeting their fiduciary duties and responsibilities.
- Ensure the client is educated and knowledgeable regarding their duties under ERISA in order to mitigate potential liability.
- Assist the client with the administration of the plan.

- Work with third-party service providers to ensure all client needs and obligations are met.
- Pursue the Mission of the firm and demonstrate its Guiding Principles in all interactions with stakeholders of the firm and the public.

### **Skills & Abilities**

- Thorough and complete knowledge of ERISA and the retirement planning industry.
- Ability to read, interpret and apply plan document provisions.
- Excellent written and verbal communication and interpersonal skills.
- Ability to organize, multi-task and work independently on several projects and meet deadlines.
- Skill in defining problems, collecting data, and interpreting information.
- Ability to be a critical and creative thinker, problem solve and make decisions under own initiative.
- Strong computer skills including Microsoft products (Word, Excel, PowerPoint, CRM and LiveMeeting).
- Ability to travel independently 30% - 40% of the time. Some overnight travel required.

### **Experience & Education**

- Bachelor's degree in business. Master's degree highly desirable.
- QPA Designation (or obtainable within 2 years of hire).
- Experience presenting complex information to individuals and groups.
- Significant client service experience preferred.

### **About Pension Consultants, Inc.**

Pension Consultants, Inc. is an innovative pioneer in objectively managing and evaluating all facets of employer-sponsored retirement plans. We are an independent advocate for our clients and provide proactive, in-depth research, attentive supervision and advice on all matters relating to ERISA, investments, participants and vendors.

[www.pension-consultants.com](http://www.pension-consultants.com)

Interested candidates should mail, fax or email a resume to:

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