TPA Benchmark Talent Solutions℠

Consultant
Job 182
Remote

Thank you for using the TPA Benchmark Talent Solutions Job Board!

POSITION SUMMARY

To generate new business through new plan sales and takeovers, to create and maintain a clientele within the APC system and to develop and maintain a referral network of CPA's, Financial Planners, Brokers and Attorneys. To interact with clients, advisors and the firm's internal support staff to service clients.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Serve as primary client contact; handling client phone calls, written correspondence, resolving problems and questions and provide employee presentations when requested.
- Deliver Annual Reports as necessary.
- Review invoice accuracy.
- Ensure all information (i.e., trust information, census and other documents) received from the client is complete, on time and forwarded to appropriate department. Request additional/missing information from client as needed.
- Review plans for appropriate design and make plan design recommendations to client as necessary.
- Contact client regarding fee collections when client does not respond to current billing system.
- Ensure compliance of filing deadlines.
- Document client conversations under Notes tab in the firm's Gold.
- Review aging reports, make follow-up calls and send letters per follow-up procedure.
- Educate client about the firm's functions and timelines.
- Sell new plans and acquire takeover clients
- Generate new referral sources and market existing referral sources.
- Meet established budgeting/marketing goals.
- Maintain satisfactory attendance hours both on and off-site to ensure completion of all responsibilities.

AUXILLARY DUTIES AND RESPONSIBILTIES

- Maintain technical expertise to perform the above duties.
- Other duties may be assigned.

KNOWLEDGE – SKILLS – ABILITIES

- Ability to travel and work beyond normal business hours.

- Knowledge of effective sales tactics and techniques.
- Knowledge and proficiency in Microsoft Office, predominantly Word and Excel applications preferred.
- Knowledge of relevant pension plans.
- Excellent communication skills (written and verbal).
- Excellent math, analytical and organizational skills.
- Ability to develop and deliver client sales presentations.
- Ability to interpret complex technical literature.
- Ability to meet sales goals.
- Ability to work independently with little supervision.
- Ability to speak, read and write in English.
- Ability to concentrate.

MINIMUM QUALIFICATIONS

- Three years in pension or related financial services industry.
- College degree in Business Administration, Finance, Marketing or related field preferred or equivalent professional experience.
- Minimum of one year sales experience.
- Able to travel independently to client sites. *(Valid driver's license and proof of insurance required at all times)*

PHYSICAL / ENVIRONMENTAL CHARACTERISTICS

Work is performed in an office environment and requires:

- Sitting for prolonged periods of time using a computer keyboard, mouse, and screen.
- Standing, walking, and may require twisting, reaching, bending, crouching and kneeling.
- Grasping, pushing, pulling, dragging and lifting boxes of files and other office items weighing 30 pounds or less.
- Mobility, vision, hearing and dexterity levels appropriate to the duties to be performed.
- Travel independently to client sites.