TPA Benchmark Talent Solutions℠

Relationship Manager
Job 199
Remote or On-site

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

Job Summary

Relationship Manager – MEPs/PEPs

We are looking for a full-time Relationship Manager either fully remote within the US or on-site in our New Jersey headquarters.

The Relationship Manager is the primary contact for an assigned book of primarily MEPs, PEPs and association plans. The ideal candidate is a proactive and customer-focused professional with a proven track record of nurturing and expanding client relationships. If you are a highly organized, detail-oriented individual who can easily manage multiple priorities in a fast-paced, client-focused environment, we want to connect with you!

Primary Responsibilities

- Maintain assigned book of business of assigned retirement plans
- Communicate in a timely manner directly with plan sponsors, financial advisors and recordkeepers on questions related to all aspects of their retirement plan
- Develop and cultivate a strong network of recordkeeper contacts, business owners, and other centers of influence (COI) associated with member firm
- Schedule and coordinate meetings, calls, and follow-ups with clients
- Resolve services issues escalated to you by client or COI
- Monitor annual plan projects, plan document/amendment requests and other plan projects for assigned plans
- Collaborate with other teams within member firm to ensure client expectations are met
- Lead and minute annual PEP charter meetings
- Participate in meetings with prospects, during conversions or M&A activity
- Educate plan sponsors and COIs on plan sponsor fiduciary responsibilities and member firm compliance/fiduciary solutions
- Travel as needed to effectively service member firm clients and promote member firm services
- Stay current on industry updates, legislative changes and internal initiatives as they pertain to and impact recordkeepers, clients, participants, and plan

Required Qualifications

- Three to five years of experience with a third-party administrator, recordkeeper or related experience in the retirement plan industry
- Working knowledge of 401(k) and 403(b) ERISA, IRS and DOL regulations and fiduciary responsibilities
- Strong organizational and problem-solving skills, with the ability to track multiple tasks and issues, set goals and prioritize tasks in a fast-paced environment
- Excellent verbal and written communication skills with the ability to establish rapport and provide quality customer service
- Ability to collaborate with others and work autonomously
- Proficiency with Microsoft Office Suite
- Willingness to work east coast hours

Preferred Qualifications

- Experience with MEPs/PEPs
- ASPPA, NIPA or ERPA credentials
- Bachelor's degree

Member firm is an independent third-party administrator (TPA) that offers employee benefits, retirement planning, actuarial consulting, and fiduciary services. We provide clients with customized and comprehensive solutions for medical, dental, and disability insurance as well as 401(k), pension/actuarial and fiduciary services. Member firm operates as a trusted partner to ~8,000 clients nationally.

We are an equal opportunity employer committed to diversity and inclusion. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, status as a protected veteran, or any other protected characteristic as outlined by federal, state, and/or local laws.