

Client Services Associate

Leading Retirement Solutions (LRS) is a fast paced, emerging Third Party Administration and Recordkeeping firm to company sponsored retirement plans.

LRS provides a variety of business support and company retirement plan services to companies, owners, investors and employees in 45 states. We provide Third Party Administration services including plan design and administration of company retirement plans, such as 401(k), 403(b), defined benefit, church plans, 457 plans and more for Profit and Not For Profit organizations. We also offer open architecture recordkeeping services, providing investment advisors, managers, plan sponsors and participants with access to traditional and non-traditional investments.

This is an exciting time for us as we continue to grow, and you will support and work in an often-changing work environment. If you seek a workplace offering a clearly defined set of duties and procedures that rarely change, we are not the right fit for you.

Position: **Client Services Associate**

Hourly Compensation: \$17-\$20/hr.

Location: Seattle, WA

Hours: Full Time

Starts: Immediate

This position will be responsible for the following:

- Supporting a team responsible for servicing company sponsored retirement plans.
- Entering data in multiple databases, reviewing, updating and correcting data in existing databases
- Implementation and onboarding for clients, including uploading documents, delivering account login information and increasing utilization of new online accounts by participants, all while following security protocols
- Maintenance of online client accounts
- Participant Statement setup and production, quarterly statement process including organize, print, compliance, manage returned statements and locate missing participants
- Providing support and account status updates to our clients including business owners and their employees
- Drive Customer behavior by providing support to clients, including making outbound phone calls/email campaigns to obtain outstanding agreements, documents, information and outstanding invoices
- Drafting and maintaining current procedures for all functions

An ideal candidate should possess the following skills:

- Display and support a work behavior driven by self-motivation, proactivity, and efficiency
- Superb communication skills
- Accuracy is critical to your success in this position
- A high sense of urgency to completing deadlines and solving problems
- A strong understanding of timely and superior customer service
- Solutions oriented and ability to handle changing and competing responsibilities
- Strong command of technology and ability to easily and quickly learn new software solutions

- An understanding of the importance of procedures and contributing to the success of those procedures as evolving occurs
- Works well with a team, including other team members who work remotely/virtually
- Computer proficiency is required. We expect a proficient ability to use Excel, Word, Outlook, Adobe Acrobat, browsing network directories, and dual screens
- An acumen for financial information
- High volume of incoming calls revolving around customer inquiries
- Bachelor's degree preferred

We Offer

We Offer Benefits: PTO, Medical benefits, company sponsored 401(k) Plan + company matching contributions, bonuses. Financial support for ongoing education and credentialing. A great, casual working environment. We are a growing company providing each of our team members the opportunity to be a part of our company's success.

Please send a resume, cover letter, unofficial transcripts, references and any additional applicable information to:

Attn: Human Resources

hr@leadingretirement.com

www.leadingretirement.com