LEADING RETIREMENT SOLUTIONS

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Paid Internship: Recordkeeping Intern

LRS provides a variety of business support and company retirement plan services to companies, owners, investors, and employees. We design and administer 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.

We are seeking a highly motivated, hard-working individual to join our exciting, emerging, and successful business. We are growing, which demands dynamic employees and processes. If you possess the skill set to thrive in a fast paced and often changing work environment, we want you to join our team!

Pay: $15.00 per hour.
Location: Headquarters in Seattle, WA – Queen Anne Square
Hours: 15-20 hours per week - work schedule is flexible to accommodate your class schedule.
Start Date: Immediate

Job Objective: The primary objective is to perform accurate and timely services for clients.

Essential Responsibilities/Activities:

1. Assisting with the Recordkeeping Tasks including, but not limited to:
    a. Preparation of financial statements for retirement plans, including analyzing investment statements and data entry
    b. Assisting with task completion and review as needed
    c. Assist with file Upload tasks
    d. Assisting with custodial account clean up
    e. Assuming additional and/or different responsibilities/activities that may be assigned as you gain experience
2. Loading retirement plan and employee records into various software systems, compliance and reconcile plan records
3. Keeping current with new procedures to maintain and improve your level of skill
4. Maintaining proficiency in using systems and office equipment
5. Sharing knowledge with other members of the firm to maintain and improve quality of our services and image.
6. Making suggestions to improve our firm's services (including new services, improvements to existing forms and/or procedures, cost efficiencies, etc.) so we can provide better service, retain clients, and attract new clients
7. Helping to maintain goodwill with clients, their advisors, and other professionals

Requirements:

1. Work Authorization: U.S. Citizen or Permanent Resident Visa
2. Major(s): School of Business/Accounting, School of Business/Finance, School of Business/MBA in Accounting, School of Business/MS in Accounting, or other related field of study.
3. Degree Level: Bachelors or Masters
4. Strong command of technology and ability to learn new software solutions
5. Proficient multitasker, strong attention to detail, driven to succeed, extremely organized, and resourceful
6. Proven record of accomplishment in a fast-paced and rapid-changing environment
7. Excellent communication skills
8. Professional demeanor, ability to work with others as well as independently
9. Experience with company sponsored retirement plans and/or experience in the financial services or investment industry is preferred, but not required

We generally receive a large volume of application. If your application reflects the qualifications we have described, we will contact you to schedule an initial phone interview.

To Apply: Email Human Resources - hr@leadingretirement.com - be sure to include cover letter, resume, references, and unofficial transcript.