

Recordkeeping 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 48 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. We are looking for team members who want to be a part of building our team and company. This is an entry level position with lots of opportunity for advancement as we continue to grow. 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: **Recordkeeping Associate**

Salary: Dependent on experience

Location: Seattle, WA – Remote capability

Hours: Full time

Starts: Immediate

This position will be responsible for the following:

- Support daily and balance forward defined contribution and defined benefit plans
- Daily trading and reconciliation
- Contribution processing, including processing payroll contribution files
- Distribution and loan processing
- Payroll and contribution reconciliation
- Review Match Calculations
- Payroll training with new clients
- Set up outgoing & incoming rollovers for plan participants, including working with participants and banks and keeping clients apprised of progress
- Enrollment, contribution, and investment allocation set up for participants
- Customer support, including answering phones and email inquiries
- Review plan documents and understand retirement plan provisions
- Monthly and quarterly fee processing, including invoicing and plan asset sweeps
- Create online accounts for each customer, including uploading documents, deliver account login information and monitor utilization
- Review fund notices
- Assist with plan conversions
- Provide support to our clients including business owners and their employees
- Develop new processes, resulting in greater efficiencies and reduced costs

- Support, coordinate, and develop processes with a team responsible for servicing a book of company sponsored retirement plans

An ideal candidate should possess the following skills:

- Experience with company sponsored retirement plans and/or experience in the financial services or investment industry is preferred
- Daily recordkeeping or trading experience is preferred
- Experience with Investlink/SRT is preferred
- Accounting, bookkeeping or math background tends to lend to success in this position
- Superb communication skills and a commitment to superior customer service
Accuracy, accuracy, accuracy is critical to your success in this position
- Deadline driven
- Solutions oriented and ability to handle changing and competing responsibilities are necessary skills when working in an emerging business, like Leading Retirement Solutions
- Strong command of technology and ability to learn new software solutions easily and quickly
- Works well with a team

We Offer Benefits: Medical, vision, and dental benefits, company sponsored 401(k) Plan + company matching contributions. Financial assistance with ongoing education and credentialing. Six paid holidays and paid time off; additional paid time off days are awarded at least annually.

A great, casual working environment with opportunity to work remotely. 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 and any additional applicable information to

Attn: Hiring Department

careers@leadingretirement.com

www.leadingretirement.com