LEADING RETIREMENT SOLUTIONS

PLAN FOR THE FUTURE. FOLLOW THE LEADER.

Retirement Plan Administrator

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 a junior/associate 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: **Retirement Plan Administrator**
Salary: DOE
Location: Seattle, WA
Hours: Part or Full Time
Starts: Immediate

This position will be responsible for the following:

- Support a team responsible for servicing company sponsored retirement plans.
- Drive Customer behavior by providing excellent support to clients, including but not limited to; outbound phone calls/email campaigns, obtaining outstanding client documents, updating client information and communicating outstanding invoices.
- Review plan documents, understand retirement plan qualification requirements, provisions and accurately apply to client and participant circumstances, including distributions, loans and vesting.
- Support the retirement plan conversion, deconversion and termination process.
- Preparation of 5500 forms, related schedules, and other IRS forms.
- Collect and track necessary information for completion of valuation reports, including working with multiple types of investment providers
- Reconcile trust assets to participant accounts
- Perform annual testing including coverage, top heavy and non-discrimination testing
- Contribution calculations. Prepare projected and actual plan contributions. Cross testing experience a plus
- Understand and communicate eligibility requirements to sponsors and participants
- Review of census data, determine employee eligibility, participation, and enrollment and communicate information to clients
- Assist client in locating missing participants and securing ERISA bonding
- Calculations, compliance review, processing and client communication related to loans, hardship withdrawals and other distributions
- Determine RMD eligible, calculate and communicate distributions to be taken or waived
- Work and communicate with Sponsors and Participants in processing requests
- Prepare quarterly management reports and participant statements

- Understand, prepare and communicate plan and participant notification requirements including annual notices and special circumstance notifications

This job will be a good fit for you if you have/are:

- Seeking an opportunity to grow in the retirement plan industry
- Superb communication skills and a commitment to superior customer service
- Excellent attention to detail and accuracy, proficient with numbers and basic calculations
- A demonstrated track-record of consistently meeting and/or exceeding performance expectations
- Ability to work independently and as part of a team in a fast-paced environment
- Demonstrated ability to build relationships and leverage a firms existing strengths
- Willingness to continually upgrade knowledge and understanding of our industry
- Self-motivated with excellent organizational skills
- Solutions-oriented
- Proven success in a rapid changing and fast-paced work environment

Preferred experience and qualifications include:

- Bachelor’s Degree
- Minimum of 2-years industry or 2 years of related industry (banking, finance, investments, wealth management) experience
- ASPPA Retirement Plan Fundamentals (RPF) Certified
- Proficiency is required with Excel, Word, Outlook, Adobe Acrobat, browsing network directories, and dual screens as we are a paperless office
- Basic understanding of business entities and what comprises a workforce within a retirement plan
- Basic understanding of non-traditional investments and how they are treated in a retirement plan

We Offer Benefits: Medical, vision, and dental benefits, company sponsored 401(k) Plan + company matching contributions. Financial assistance with ongoing education and credentialing. Eight 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 cover letter, resume, references, and any additional applicable information to:
Attn: Human Resource Department
hr@leadingretirement.com
www.leadingretirement.com