Staffordshire Benefit Consulting, LLC - Third Party Administrator (Account Manager) – Voorhees, NJ

We are currently looking for an experienced Retirement Plan Administrator. This position is a full time position with an assigned caseload.

Job Responsibilities to include the following but not limited to:

- Manage all aspects of client administration for 80-85 assigned accounts
- Answer client calls and correspondence regarding all facets of retirement plan administration
- Prepare and Review Annual Census and Client Questionnaire, Plan Documents, and Plan Highlights for completeness and accuracy
- Retrieve, review, prepare and upload current year data to compliance system
- Run/evaluate employee eligibility to participate including identifying HCE/Key employees
- Prepare all required discrimination testing including ADP, ACP, 402(g), 404(a), 410 (b), 414(s) 415 and 416 testing
- Complete annual trust accounting and plan valuations including Form 5500 and all required schedules; prepare 5330 as necessary
- Finalize Year-end documents and prepare annual valuation binders
- Be proficient in reviewing plan distributions
- Assist with required notices, plan consulting, and amendments
- Resolve any plan, transaction, and/or distribution issues and expediting correction or adjustment; following up to ensure resolution
- Provide all other admin support as needed such as data entry for lost earnings, audit package requests, etc.
- Prepare filings for specialized projects (e.g. plan audits and VCAP Compliance Work).

Qualifications and Experience:

- Knowledge of Defined Contribution and Defined Benefit plans.
- Hold a bachelor's degree or comparable professional work experience
- Demonstrate strong customer focus and an excellent phone manner
- Have the ability to solve problems without direct supervision
- Have strong attention to detail, organization, multi- tasking, and follow up skills
- Demonstrate strong interpersonal, written, and verbal communication skills
- Be a confident self-starter with a "can do, will do" collaborative attitude
- Knowledge of current ERISA, IRS and DOL rules and regulations
- Have technology and computer proficiency in Microsoft Office, Relius or similar software
- Have 4 or more years of retirement plan administration experience
- ASPPA Credentials, preferred

Schedule: Monday through Friday
Job Type: Full-time
Benefits:

- 401 (k)
- Medical Insurance
- Paid Vacation

Salary negotiable - based on experience
How to Apply
Send resume to - dgallagher@g3cpa.com