

## **CLIENT RELATIONSHIP MANAGER, RETIREMENT BENEFITS**

The Client Relationship Manager, Retirement Benefits partners with a Senior Financial Advisor in maintaining client relationships and accounts. This individual prepares and presents retirement plans, including both defined contribution and defined benefit plans, to clients. The Client Relationship Manager, Retirement Benefits leads the plan implementation, educates and enrolls employees, and services the account during the plan year, while maintaining all compliance and customer service standards.

### **What You Will Do:**

- Meet with clients and prospects to discuss and evaluate all aspects of retirement plan or deferred compensation plan needs and services.
- Assess clients' situation by gathering information regarding plan objectives, number and size of accounts, eligibility, and contribution strategy.
- Evaluate investment options, including expenses, performance, and risk.
- Develop retirement plans recommendations based on client needs.
- Review investments, strategies, and goals with existing clients on a regular basis.
- Ensure accuracy of retirement plan documents and prepare required participant notifications.
- Gain expert knowledge on custodians, plans, and services.
- Serve as an advocate and liaison for client with custodian and third-party administrator.
- Maintain confidential and time sensitive material.
- Promote Cary Street Partners and Retirement Services products to clients and prospects and generate referrals.
- Prepare client proposals, client books, and presentations.
- Open and service accounts.
- Conduct enrollment meetings for employees.
- Assist in planning and logistics for client seminars.
- Adhere to all applicable IRS and DOL requirements and ensure all compliance standards are met.
- Maintain confidential and time sensitive material including marketing materials and other forms.
- Prospect for new clients.
- Represent the firm within the community at events.
- Assist with special projects and other duties as assigned.

### **Your Skillset Includes:**

- 3+ years of experience administering retirement plans preferred.
- Series 65 license or the ability to obtain it within 6 months is required.
- Knowledge of IRS and DOL rules governing 401K plans.
- Understanding of financial markets and financial services companies.
- Knowledge of different custodians and platforms.
- The equivalent of an Associate degree, or 2 years of college is preferred.
- Life and Health Insurance License preferred.

- Willingness to obtain other licenses as the need may arise.
- Proficiency with Microsoft Office Products – Power Point, Excel, Word, Outlook.

**The Following Describes You:**

- Strong written and verbal communicator who effectively interfaces with clients, associates, and vendors.
- Highly-organized with excellent attention to detail and analytical skills.
- Able to work effectively on multiple projects with different associates.
- Able to represent the Firm in a positive professional manner.
- Self-starter with the drive to learn new processes quickly, take initiative, and multi-task with minimal supervision.
- Able to quickly assimilate information and address problems in a fast-paced team environment.
- Collaborative team player with a positive attitude.
- Customer service mindset and ability to maintain confidential information.
- Willing to travel on occasion.
- Unquestionable integrity and good judgment.

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, or veteran status.