Retirement Benefits Account Specialist

PENMORE
FINANCIAL GROUP | BENEFITS | WEALTH MANAGEMENT

VAUGHAN, ON | Reporting to: Vice President, Group Retirement Services

POSITION OVERVIEW:

The Retirement Benefits Account Specialist is responsible for managing a portfolio of clients, answering plan member inquiries and providing information regarding products, services and policies. The RBAS must provide account support for group retirement accounts, such as compiling annual CAP reports, hosting education sessions, and processing requests for service. The Account Specialist will also be required to resolve customer complaints via phone or email.

RESPONSIBILITIES:

Account Management (70%)

- Fully manage a block of group retirement clients.
- Meet with clients to review their current retirement programs.
- File Annual Information Returns (AIRs) on behalf of clients, help prepare CAP (Capital Accumulation Plan) reviews to ensure compliance with regulators.
- Create custom education strategies for clients you are responsible for in your block.
- Educate plan members/administrators on all aspects of their retirement plan, when required, and answering product and service questions concerning their group retirement plan.

Administration and Planning 30%

- Provide administrative support to the firm's VP, Group Retirement Services and Account Manager.
- Maintain thorough knowledge of product/services offered by various group retirement carriers.
- Maintain customer records by updating account information on CRM system (Maximizer)
- Resolve customer complaints quickly and tactfully. Escalate complaints as required by company policy if a resolution cannot be made personally.
- Provide information to customers and the public concerning goods, services, schedules, rates, regulations and policies in response to telephone and in-person inquiries.
- Support the firm's annual business planning initiatives.
- Continuously work on developing and improving internal processes

REQUIREMENTS:

- Minimum Education: Completion of Secondary School. Completion of some college or other post-secondary programs preferred.
- Minimum Experience: At least 5-years' experience in a group retirement services support role.
- RPA designation preferred.
- Completion of CSC and IFIC would be desirable.
- Excellent customer service.
- Thorough knowledge of group retirement products and/or services.
- Excellent listening and communication skills.
- Conflict resolution and problem-solving skills.
- Strong verbal and written communication.
- Proficient in Word, PowerPoint, Excel

Qualified candidates are invited to email their resume and cover letter to: lisa@penmore.com

We are committed to providing accommodation upon request for applicants and employees with disabilities. If you require accommodation, we will work with you to meet your needs.