

Position Description

- Title: Retirement Plan Representative
- Status: Full time 8:00am to 4:30pm (40 hours per week)
- Approximate start date: Mid to late June 2024
- Location: In office 5 days per week (M-F) to start. Upon completion of introductory Training (one month minimum), 1 day per week in office required and 4 days at home.

Job Summary

The Retirement Plan Representative (RPR) provides investment education to Retirement Plan participants and Plan Trustees, fields inquiries regarding the market or account status, and facilitates trades in participant accounts upon request. The RPR provides support to the firm's advisers in the form of data gathering, modeling, case design, plan development, presentation development, etc. May participate in client meetings. Has no decision-making authority on client matters.

Duties and Responsibilities

The Retirement Plan Representative can expect to focus their work in the following areas:

- Gather, organize and synthesize Annual Trustee Report data for review by supervisor
- Conduct research and reviews of menu options
- Implement menu changes
- Prepare Investment Policy Statements and ensure that plans are in compliance
- Collaborate as a member of the Investment Committee
- Provide allocation advice to participants
- Attend Benefits Fairs and assist participants with general questions and allocation assistance

Qualifications and Skills Required

- Degree from an accredited college or university
- Series 65 securities license is required for the position. If candidate does not have license, must be willing to obtain before employment commences.
- Proficiency in Windows-based software, Excel proficiency a plus
- Strong verbal and written communication skills
- Must be *proactive* and have the ability to *focus on self-reliance*
- Organized, *detail-oriented*, and the ability to multitask
- Strong analytical skills
- Ability to handle multiple projects while being interrupted
- *Client-first attitude*
- Team player, collaborative, able to work with and through others, but also able to work independently
- Desire/ability to work successfully in a small company environment, willingness to occasionally cover for coworkers with their duties
- Aptitude and flexibility to grow into additional responsibilities as needed

Salary and Benefits

- \$52,000-\$60,000 based on experience and qualifications
- Medical, dental, vision, long term disability, and participation in our SIMPLE IRA retirement plan
- Paid Time Off based on tenure, 12 observed holiday days off, and "flex" time available when needed
- Financial support upon employer approval for professional accreditation/continuing education and other education/training opportunities

How to Apply

Qualified individuals should send a cover letter and resume to Mike Stutzke via one of the following methods: Email to mike@northernwelcome.com, fax to (509) 456-2550, or mail to our address listed below.