Retirement Plan Specialist

Providing exceptional service to our clients starts with investing in exceptional people!
We are an independent wealth management firm committed to providing "Advice at a Higher Level" to our clients. A contributing factor to our success is a unique team structure. How do we build a successful team? We foster a culture of professional development, collaboration, and respect. We are passionate about what we do. We have fun, we work hard, and we are nice to each other. A successful team takes care of each other. This translates to a highly competitive Total Rewards package, including a generous benefits package and a paid time off policy that reflects our commitment to a healthy work-life balance.

The Retirement Plan Specialist Role
Manage, support and coordinate retirement plan client relationships under the direction of a Lead Advisor. Interact with multiple internal and external contacts, including participants. This is a salaried, exempt position, reporting to the Client Services Manager.

- Provide administrative support for the firm's retirement plans, including assisting plan administrators and participants with questions regarding their plans. Assists with 401(k) participant meetings as requested.
- Conduct onsite education and enrollment meetings, to include preparation of materials.
- Prepare materials for trustee meetings.
- Prepare proposals for recordkeeper and third-party administrators.
- Conduct plan benchmarking for current and prospective clients.
- Assist with the onboarding of new retirement plans.
- Assist with the preparation of requests for proposals.
- Interact with trustees, plan sponsors, plan participants, TPAs and record keepers as needed to service Retirement Plans.
- Ensures accuracy and integrity of retirement plan records.
- Positively engage with all members of the team in a professional office setting to support and advance Cable Hill's culture.
- Assist with projects as needed.
- Assist members of the Operations Team as needed.

Your Work Experience, Skills and Education

- A minimum of three years' experience in a client-facing role in the financial services industry. Experience working directly with retirement plans strongly preferred, but not required.
- Current Series 65 or 66 license required.
- Bachelor's degree required.
- Experience and skilled at delivering educational meetings in a group setting highly preferred.
- Proficiency in Microsoft Office products required.
- Experience with Salesforce preferred, but not required.

Skills & Attributes

Teamwork – Highly collaborative and dedicated to continuous perfection of CHP's ability to deliver superior customer service to its clients.

Customer Service – Exceptional internal and external customer service skills. Ensures positive interactions through active listening and professional feedback.

Communication — Excellent oral and written communication skills. Projects a professional, capable image in both action and appearance. Comfortable conducting educational meetings in a group setting.

Leadership – Provides leadership through modeling a vision of excellence in the client experience. This vision is shared through coaching in a manner that provides a positive learning culture for client-facing staff members.

Integrity – Exhibits a high level of integrity through interactions with internal and external customers. Goes above and beyond to do what is right for team members and clients.

Professionalism – Exhibits a professional and capable demeanor to clients and external affiliates. Represents CHP in a positive manner in all interactions with clients and affiliates.

Engagement – Contributes to the development of CHP through engagement and enthusiasm. Acts on the belief that every employee contributes to the success of CHP. Builds effective working relationships with colleagues.

Capacity – Strong time management skills, with an ability to effectively organize and prioritize tasks. Manages heavy, time-sensitive workloads, while maintaining accuracy through a strong attention to detail.

Judgment – Skilled problem-solving, particularly for obstacles in which the next course of action is unclear. Seeks guidance and direction, without hesitation, when unsure of how to proceed.

Reliability – Understands and responds to the importance of being a dependable team member. Arrives to work on time, keeps calendar updated and communicates barriers with team members if tasks cannot be completed on time.

We strongly urge people from unrepresented groups to apply.

Cable Hill Partners provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, sexual orientation, national origin, age, disability, or genetics. In addition to federal law requirements, Cable Hill Partners complies with applicable state and local laws governing nondiscrimination in employment. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation, and training.

Cable Hill Partners expressly prohibits any form of workplace harassment based on race, color, religion, gender, sexual orientation, gender identity or expression, national origin, age, genetic information, disability, or veteran status. Improper interference with the ability of Cable Hill Partners' employees to perform their job duties may result in discipline up to and including discharge.