Exclusive Plan Administrator Opportunity

In Northern California- Chico and Sacramento, CA

Associated Pension Consultants' (APC) unique business model was developed to reward employees for their company contributions beyond the offerings of most TPA's. The average tenure of many of our employees is over 20 years and this is no fluke. APC is currently searching for a candidate for Chico and Sacramento, CA as a result of continued growth and the upcoming retirement of a long-time employee. We are excited to extend this rare opportunity.

Established in 1974, APC services over 3,000 clients across the country. The Company offers a novel approach to plan administration.

APC's administrators manage a diverse caseload of small to medium sized DC, DB, and hybrid plans. They are responsible for maintaining this book of business via an extremely high touch business model, which allows for a balance of time spent out visiting clients and in the office. Our administrators have great discretion over how they organize their work schedules to best meet the needs of their clients and themselves.

Qualifications:

- 3+ years in pension administration or related financial services industry with substantial client interaction preferred
- Driven, disciplined individual that excels working with a team and independently
- Ability and desire to travel locally often and regionally at times
- Excellent communication and presentation abilities

Benefits:

- Salary and sales based commissions, with the expectation for growth into a more robust revenue based compensation program that could lead to six-figure income potential
- 401(k) plan,100% Employer Paid Medical, Dental and Vision for our employees (dependent premiums extra), plus discounted AFLAC and pre-paid legal services
- Financial support toward industry certifications

It would be our pleasure to discuss this unique opportunity with you!

How to Apply:

Please contact us directly at **hr@e-apc.com** with your resume, cover letter and salary requirements.
For more information about APC please view our website at **www.e-apc.com**

Job Description

Associated

Pension

Job Title: Consultant
Department: Consulting
Reports To: President or VP
FLSA Status: Exempt
Locations: Sacramento, Chico

POSITION SUMMARY

To generate new business through new plan sales and takeovers, to create and maintain a clientele within the APC system and to develop and maintain a referral network of CPA's, Financial Planners, Brokers and Attorneys. To interact with clients, advisors and APC's internal support staff to service clients.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Serve as primary client contact; handling client phone calls, written correspondence, resolving problems and questions and provide employee presentations when requested
- Deliver Annual Reports as necessary
- Review invoice accuracy
- Ensure all information (i.e., trust information, census and other documents) received from the client is complete, on time and forwarded to appropriate department. Request additional/missing information from client as needed
- Review plans for appropriate design and make plan design recommendations to client as necessary
- Contact client regarding fee collections when client does not respond to current billing system
- Ensure compliance of filing deadlines
- Document all pertinent client conversations under Note tab in Goldmine
- Review aging reports, make follow-up calls and send letters per follow-up procedure
- Educate client about APC functions and timelines
- Sell new plans and acquire takeover clients
- Generate new referral sources and market existing referral sources
- Meet established marketing goals
- Maintain satisfactory attendance hours both on and off-site to ensure completion of all responsibilities

AUXILLARY DUTIES AND RESPONSIBILTIES

- Maintain technical expertise to perform the above duties
- Other duties may be assigned

KNOWLEDGE – SKILLS – ABILITIES

- Ability to travel and work beyond normal business hours.
- Knowledge of effective sales tactics and techniques
- Knowledge and proficiency in Microsoft Office, predominantly Word and Excel applications preferred
- Knowledge of relevant pension plans
- Excellent communication skills (written and verbal)
- Excellent math, analytical and organizational skills
- Ability to develop and deliver client sales presentations
- Ability to interpret complex technical literature
- Ability to meet sales goals

- Ability to work independently with little supervision
- Ability to speak, read and write in English
- Ability to concentrate

MINIMUM QUALIFICATIONS

- Three years in pension or related financial services industry
- College degree in Business Administration, Finance, Marketing or related field preferred or equivalent professional experience
- Minimum of one year sales experience
- Able to travel to client sites *(Valid driver's license and proof of insurance required at all times).*
- Registration in the DMV Pull Program required

PHYSICAL / ENVIRONMENTAL CHARACTERISTICS

Work is performed in an office environment and requires:

- Sitting for prolonged periods of time using a computer keyboard, mouse, and screen
- Standing, walking, and may require twisting, reaching, bending, crouching and kneeling
- Grasping, pushing, pulling, dragging and lifting boxes of files and other office items weighing 30 pounds or less
- Mobility, vision, hearing and dexterity levels appropriate to the duties to be performed
- Travel independently to client sites