Legacy Retirement Solutions, LLC (Legacy), is presenting an excellent opportunity for the right individual to join our growing retirement plan team as a 401(k)/Pension Administrator. Legacy is a non-producing, fee-for-service third party retirement plan administration company that provides retirement plan consulting, plan design and administration. The plan types include 401(k), Profit Sharing, 403(b), 457, Cash Balance and Traditional Defined Benefit Plans.

DUTIES AND RESPONSIBILITIES

Job Responsibilities:

- Maintain client relationships on an assigned case load
- Effectively communicate with clients, financial advisors and other professionals
- Effectively and efficiently maintain the case load including but not limited to
- Data collection
- Compliance testing including ADP/ACP, top heavy, 410(b), 401(a)(4), 402(g) and 415 limits
- Form 5500 and other government filing preparation
- Support clients through audits
- Employer calculation contributions (including age-weighted and new comparability)
- Reconciliation of quarterly/annually brokerage account statements and trust reports
- Balance forward recordkeeping and statement production
- Manage benefit processing, including reviewing requests, verifying vesting, and submitting of loan and distribution paperwork to vendors.
- Answer inquiries from clients and financial advisors.

Qualifications:

- Bachelor’s Degree or equivalent experience
- 3-5 years 401(k) plan administration experience required
- Working knowledge of FT Williams software, preferred
- Proficiency in Microsoft Office
- Excellent verbal and written skills
- Knowledge of ERISA regulations and plan documents
- Strong problem solving and analytical skills
- Detail oriented and a positive
- Comfortable working in a structured, fast-paced environment
- Strong interpersonal communication skills, capable of building good working relationships
- Must be organized, self-motivated, strong attention to detail, able to multi-task, team-oriented