

TPA PLAN ADMINISTRATOR

Position Summary

Provide Plan Sponsors and Participants comprehensive customer service, administration and compliance services for assigned case-load of voluntary 403(b), 457(b), and 401(a) Retirement Plans.

Position Responsibilities

- Communicate product knowledge accurately and effectively with distribution partners, clients, participants and team members
- Approve transactions based on plan design and regulations
- Process common remitting within deferral and contribution guidelines such as 402(g), 415(c), and 457 MAC
- Formulate, articulate, and explain complex ideas
- Liaise with plan vendors to facilitate accurate and compliant plan administration including obtaining and providing necessary information

Role Qualifications

- Possess three-five years of defined contribution administration experience
- Must have strong analytical skills
- Solid experience working with IRS code sections 403(b) and 457(b)
- Strong product knowledge with the ability to read and interpret plan documents, IRS regulations, and DOL guidelines
- Ability to process Salary Reduction Agreements
- Extensive experience processing a variety of retirement transactions such as loans, hardships, distributions, and transfers

Specific competencies and attributes that are important to the position include:

- BS/BA from a 4-year college or university
- Ability to communicate effectively with peers and upper management
- Ability to thrive in a collaborative, hardworking, yet casual environment
- Driven by deadlines and detail oriented with the ability to thrive in a fast paced, high-volume, multi-tasking environment
- High level planning and communication skills (verbal and written)
- CEBS Certification Desired but not required

Location

- The position is based at the company's operations office in Downtown Lakeland, Florida.