

DISTRIBUTIONS PROCESSING ASSOCIATE

Primary Responsibilities

MidAmerica's Invested Plans Distribution Processor serves as a point of contact for the participants and employers, handling a variety of tasks for both internal & external employees and partners, such as written communications, client contact management, and incoming distribution processing. The primary duties and responsibilities of the Invested Plans Distribution Processor include but are not limited to the following:

Responsibilities:

- Review plan distributions and determine eligibility based on plan design and regulations
- Communicate product knowledge accurately and effectively with distribution partners, clients, participants and team members
- Strong understanding of our product offerings in order to answer or escalate internal questions
- Responsible for updating the department's record keeping system
- Required Minimum Distribution processing and knowledge of IRS requirements
- Process all distributions and meet distribution deadlines (both individual and team deadlines)
- Review and manage the authorization list process where applicable
- Process denial/NIGO letters
- Assist in the check file peer process
- Ensure data is accurate for participants and employers
- Continuously evaluate and identify opportunities to drive process improvements that positively impact the business
- Deliver exceptional on-demand support for clients and partners which results in fanatical support of MidAmerica
- Provide branded documentation, marketing material and any necessary reporting assistance
- Ability to provide extremely professional and articulate written and verbal communication
- Must routinely meet daily, weekly, and monthly deadlines
- Maintain a pleasant, patient, and friendly attitude

Performance Measures

Performance will be measured by a number of quantitative and qualitative criteria. The primary outcomes and measurement of success for the Invested Plans Distribution Processor include but are not limited to the following:

- After completing initial training & onboarding develop a professional personal brand for communications with internal staff as well as external partners
- Deliver exceptional on-demand client support by providing error-free distribution processing
- Provide information and assistance to other departments to ensure accurate plan processing
- Be sensitive to the timely response required by clients, both internal and external and respond to all queries according to the standards outlined in the MidAmerica communication protocol
- Ability to use technical tools to drive efficiency and accuracy
- Meet all other activity and outcomes goals

The incumbent will support the company's vision, mission, and values and help drive a PeopleFirst culture; doing what's best for the business, its employees, and its investors, protecting the company's reputation and being open, honest, and fair in all dealings and scenarios.

Skills and Qualifications

Specific Qualifications and career profiles that are essential to the position are as follows:

1. Ability to communicate effectively with peers and upper management and liaise frequently with customer service and the accounting departments to ensure timely and accurate processing
2. Strong analytical, planning, communication, and evaluation skills (verbal and written)

3. Must be detail-oriented
4. Experience working in a fast-paced, high volume environment driven by deadlines
5. Ability to work independently and collaboratively with team members
6. Advanced knowledge of Microsoft Office Suites, specifically Outlook, Word, and Excel and the willingness to learn new systems as required
7. Regular attendance is required
8. Knowledge of IRS regulations and experience working with IRS code sections 401(a), 403(b), and 457(b) (one-two years of experience)
9. Strong product knowledge with the ability to read and interpret plan documents, IRS regulations, and DOL guidelines

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

1. Retirement industry experience preferred
2. Must have superior organizational skills, the ability to multi-task, prioritize and collaborate in a team environment
3. Associate's Degree required
4. Bachelor's Degree (valued but not required)

Location

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