SAPERS & WALLACK

Creative thinking. Customized solutions. Caring about you since 1932.

Client Relationship Manager - Retirement Plans

The Client Relationship Manager will be part of a service team responsible for the overall satisfaction of our retirement plan clients. The CRM will work closely with the Vice President of Retirement in managing our retirement plan consulting relationships. The Retirement Plan Division of the firm provides fiduciary governance, investment due diligence, cost benchmarking and participant education services. Our client company locations are predominantly located in the Greater New England area.

Responsibilities:

- Assist in the retention, servicing, and success of our retirement plan advisory clients
- Field plan sponsor and participant phone inquiries and provide follow up when necessary
- Attend and participate in client meetings and sales meetings with V.P. of Retirement
- Draft client meeting minutes template for meetings attended
- Coordinate provider and participant educational calendar for group meetings and client one on ones
- Manage and provide schedule of retirement team projects, including regularly scheduled client meetings, plan record keeper request for proposals and new business request for proposals
- Manage the day to day relationships of current clients as directed by the V.P. of Retirement
- Project Manage new client implementations and current client plan record keeper conversions
- Manage and oversee quarterly billing process
- Data entry into Salesforce
- Learn other lines of business offered at Sapers & Wallack and effectively communicate and cross-sell opportunities with new and current clients
- Aid in find and bringing in new clients
- Assist with sales RFPs

Requirements:

- Bachelor's degree required
- NASD Series 6 or7 & 63 and Series 65 or 66 preferred
- Strong interpersonal, client facing skills
- Strong negotiation and conflict resolution skills
- Ability to collaborate with a team as well as able to work independently
- Proficient in Microsoft Office; Adobe Acrobat & Salesforce experience a plus

Prior experience:

- 3-5+ years relevant work experience
- Plan Design consulting experience and retirement plan experience a plus
- Overall investment and industry knowledge
- Experience giving group presentations
- Client management experience
- Sales experience

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