Retirement Relationship Manager – Education Specialist

The Retirement Relationship Manager will be part of a service team responsible for the overall satisfaction of our retirement plan clients. The RM will work closely with the Vice President and Director of Retirement in managing our retirement plan consulting relationships. On our team the RM will be mainly responsible for the coordination of client education programs and assist in the development and delivery. 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
- Coordinate annual participant educational calendar for group meetings and firm one on ones
- Develop, & Deliver new Retirement Education Presentations
- Attend and participate in client meetings and sales meetings with V.P. of Retirement
- Draft client meeting minutes template for meetings attended
- Manage the day to day relationships of current clients as directed by the V.P. of Retirement
- Data entry into Salesforce

Requirements:

- Bachelor's degree required
- NASD Series 6 or 7 & 63 and Series 65 or 66 preferred
- CFP 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:

- 5 – 8+ years relevant work experience
- Experience giving group presentations
- Client relationship management experience
- Sales experience