

# **Retirement Plan Services Processor / Administrative Assistant**

## **Job Summary**

Sponsel CPA Group is searching for an exceptional, experienced retirement plan processor/administrative assistant to primarily support our Retirement Plan Services (RPS) Department as well as offer support to the other departments. This position reports to our RPS partner and is a full-time/nonexempt position.

## **Skills Preferred**

Performs retirement plan processing tasks as well as administrative duties for the Retirement Plan Services Department and the various departments within the firm. Requires strong computer and research skills, flexibility, excellent interpersonal skills, project coordination experience, and the ability to work well with all levels of internal management and staff, as well as outside clients and. Strong sensitivity to confidential matters is required.

Duties include client interface, project-based work and back-up to other support staff.

## **PRIMARY RESPONSIBILITIES**

- Participant distribution processing
- Loan calculations and processing
- Plan and participant notices
- Census review and completion
- Form 5500 and related report preparation
- Annual participant reports
- Day-to-day client interaction
- Maintain and build relationships with investment advisors
- Timely and accurate completion of annual testing and reporting
- Performs variety of personnel-related administrative tasks
- Support staff in assigned project-based work
- Works independently and within a team on special nonrecurring and ongoing projects
- Assist all departments as needed

## **KNOWLEDGE AND SKILL REQUIREMENTS**

- Proven professional services work experience
- Self-confidence, high energy, self-motivation, and quick thinking
- Able to work under pressure
- Superb organizational skills
- Excellent critical decision-making skills
- Strong follow-up and follow-through proficiencies
- Strong problem-solving skills
- Ability to handle difficult situations professionally
- Must have strong Microsoft Office Suite skills including Excel & Word.
- Retirement plan administration experience
- Independently manage workload and prioritization of duties
- Superior communications skills, both oral and written
- Understanding of ERISA compliance requirements
- Demonstrate a thirst for knowledge and have the desire to become an excellent technical resource to our clients
- Knowledge of modern office practices and procedures
- Maintain office ethics and confidentiality

**BENEFITS**

- 401(k)
- 401(k) matching
- Dental insurance
- Health insurance
- Health savings account
- Life insurance
- Paid time off
- Referral program
- Vision insurance

**SCHEDULE**

- Monday to Friday
- Work Location: Hybrid remote in Indianapolis, IN 46204