



Senior Account Manager

Job Description

Basic function

The Senior Account Manager is primarily responsible for the communication and satisfaction of assigned MAP Retirement clients. The single most important aspect for success of a Senior Account Manager is pro-active, responsive communication with all assigned clients and advisors. They must directly communicate with each client and advisor utilizing Teams phone/virtual calls, other virtual options as they are presented, or email based on the client's preference. Active communication setting clear, explicit expectations with clients/advisors is an essential skill to meet and exceed clients/advisor's expectations.

The Senior Account Manager is responsible for the administration of their assigned caseload to ensure compliance with federal regulations. The Senior Account Manager must possess a high level of analytical skills and the ability to communicate all plan concepts efficiently with clients and other team members. The Senior Account Manager is responsible for maintaining MAP Retirement quality and customer satisfaction standards.

Reporting relationships

- Reports to the Director of Account Management
- Functions side-by-side with other Senior/Account Managers
- May take direction from Managing Partner(s)

Authority

- Assures client satisfaction is achieved
- Ensures Annual Administration is maintained and is compliant according to federal regulations

Responsibility / accountability

- Primary contact for client, Financial Advisor, and investment company to include timely response to all inquiries, via telephone and/or email
- Meet with clients virtually, as needed or requested by Clients/Advisors
- Accountable for administration of an assigned book of clients
- Achieving a 96% annual retention goal
- Assures MAP Retirement quality standards are maintained
- Manage activities for assigned client's
- Identify & report unresponsive clients to the Director of Account Management
- Meet the annual plan administration guidelines set forth by the Director of Account Management
- Coordinate and follow-up with Client/Financial Advisor with any plan related changes
- Coordinate Client updates through Pension Pro
- Manage workload of assigned Clients using Pension Pro for timely completion of annual reports



- Participate in other projects as needed or requested by Management
- Quality Review valuation reports prepared by other team members
- Assist in training and mentoring new hires
- Complete special projects as assigned by the Director of Account Management

Principle duties

- Point of contact for a minimum of 90+ assigned clients
- Complete workload for assigned clients within standard timeframe set by Director of Account Management
- Prepare contribution allocation projections with accuracy
- Prepare valuation report and meet plan year end deadlines as outlined by Director of Account Management
- Identify & communicate individual training opportunities and needs as appropriate
- Participate in client calls as needed

Ongoing Client management duties:

- Primary contact responsible to meet and exceed client/advisors' expectations
- Recommend and initiate plan enhancements
- Participate in Director of Management/All staff meetings by presenting timely related topics

Processing:

- Complete compliance testing and contribution allocations as needed
- Escalate plans to the Director of Account Management for review as needed
- May conduct peer review of other Account Managers as directed by Director of Account Management

First and foremost, it is the responsibility of all team members to make sure that MAP clients and advisors are provided a high level of service and are satisfied with what is provided from our organization. Team members may regularly be asked to assist with items that may fall outside of their core responsibilities to meet and exceed client/advisor satisfaction.

The Senior Account Manager must be a good communicator, display a positive “can do” attitude, be patient, multi-task, and work well on both routine & non-routine activities. They must be an outstanding time manager, capable of working strategically and thinking through issues. They must be able to work independently, as a team player and leader for other team members.