



## Transaction Coordinator Team Lead

### Job Description

#### Basic function

The Transaction Coordinator Team Lead is primarily responsible for the communication and satisfaction of assigned MAP Retirement clients. The single most important aspect for success of a Team Lead 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 Transaction Coordinator Team Lead is responsible for performing incoming daily distributions, in-service withdrawals, loans, QDRO transactions and 1099 government form preparation and filing. The Transaction Coordinator Team Lead will work together as a group to timely process & quality review all incoming requests. This will ensure all internal/external client requests are completed within the department standards set in place by the Director of Account Services.

#### Reporting relationships

- Direct report to Director of Account Services
- May take direction from Managing Partner(s) and Senior Management
- Functions side-by-side with other Transaction and Account Coordinator Team Leads, as peers

#### Authority

- Assures client satisfaction is achieved by completing incoming requests timely and accurate meeting the MAP Retirement standards
- Ensure the processing of Distributions, Loans, Required Minimum Distribution (RMD), QDROS are compliant with government reporting for all transactions
- Responsible for quality review, accurate and timely processing of transactions

#### Responsibility / Accountability

- Primary contact for internal clients, Financial Advisor, and investment company to include timely response to all inquiries, via Teams phone/virtual and/or email
- Handle escalation for resolution from Team members
- Assures MAP Retirements quality standards are maintained for all business assigned
- Ensures customers receive the proper service regarding documentation and distributions through appropriate management
- Participate in all team and direct manager meetings



### **Principle Duties**

- Ensure timely completion of the assigned incoming process requests to the Transaction Coordinators
- Quality Review work of the Transaction Coordinators responses to inquiries, transaction processes via PensionPro, accuracy of asset reconciliation, timely government form filing, distribution and loan processing are responded to timely
- Assist with coordination of training with Transaction Coordinators
- Cover team members assigned work when out of the office
- Identify & recommend efficiencies between client and team responses to improve service levels with the team
- Work with Directors to ensure Transaction Coordinators response time are within MAP's client service levels
- Recommend and initiate plan process enhancements to the Director of Account Services
- Work on other Director of Account Services additional needs when necessary
- Participate in team meetings, compliance and/or efficiency projects as requested

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 Transaction Coordinator Team Lead must be a good communicator, display a positive "can do" attitude, and can multi-task, be patient, and work well on both routine & non-routine activities. They must be an outstanding time and people manager, can work strategically thinking through issues and tactically by executing activities. They need to work independently, as a team player.