



## **Client Relationship Manager**

### **Remote Position**

MAP Retirement is a fast-growing TPA looking for a **Client Relationship Manager** to serve as the primary point of contact for a book of business for both Defined Contribution and Defined Benefit plans of all sizes. The ideal candidate must be able to demonstrate relationship management skills, including the ability to work independently as well as in a team environment.

### **Job Responsibilities**

- Strengthen relationships with clients and advisors through delivery of phone and email
- Respond to plan sponsors and advisors' questions related to all aspects of their retirement plan including plan design
- Monitor annual plan projects, calendars, and milestones
- Communicate annual plan compliance results and annual tax filings
- Maintain knowledge regarding industry trends and legislative/regulatory requirements and changes
- Proactively request information and alert clients to plan operational and compliance matters
- Prioritize, research, and resolve client questions related to technology, plan operation, compliance, and other matters
- Coordinate with other team members as required for support on recordkeeping and plan administration
- Communicate 401(k) recordkeeping processes and technology
- Maintain documentation on client projects and responses within FT William and PensionPro systems

### **Experience / Credentials**

- 5+ Years Retirement Plan Experience
- Strong interpersonal and communication skills: verbal, listening and written
- Excellent time management and organizational skills with the ability to multi-task in a fast-paced environment
- Ability to learn and adapt quickly in a changing and fast paced environment, with enthusiasm and a positive attitude
- Experience using recordkeeping/TPA software, FT William and PensionPro experience a plus
- Strong Microsoft Excel skills
- Bachelor's Degree Preferred
- Certifications through NIPA or ASPPA, including QKA or equivalent desired -- or must be willing to work towards Industry Designation credentials

Email your resume with salary requirements to: [careers@map401k.com](mailto:careers@map401k.com)