Plan Document Specialist

Job Description

Basic function

The Plan Document Specialist is primarily responsible for the communication and satisfaction of MAP Retirement clients. The single most important aspect for success of a Plan Document Specialist is pro-active, responsive communication with clients. They must directly communicate with each Internal/ External 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 Internal & external clients is an essential skill to meet and exceed clients/advisor's expectations.

The Plan Document Specialist is responsible for performing and adhering to the Plan Document team compliance with all MAP Retirement processes and procedures, use of internal systems: PensionPro, FT Williams and Pipeline. The Plan Document Specialist will ensure accurate and timely completion of incoming requests. This will ensure all internal/external client requests are completed within the department standards set in place by the Director of Plan Documents and Research.

Reporting relationships

- Direct report to Director of Plan Documents
- May take direction from Managing Partner(s) and Senior Management
- Functions side-by-side with other Plan Document Specialists, as peers

Authority

- Assures client satisfaction is achieved by completing all Plan Documents requests meeting the MAP Retirement standards

Responsibility / Accountability

- Primary contact for internal clients to include timely response to all inquiries, via Teams phone/virtual and/or email; May interact with external client/ advisor upon request
- Assures MAP Retirements quality standards are maintained for all business assigned
- Ensures Internal/External Clients receive the proper service through appropriate management
- Increase and/or maintain Industry knowledge by attending webinars, virtual trainings, certifications and/or obtaining designations as presented by either Direct Manager, Managing Partner, or Senior Management Team.
- Participate in all team and direct manager meetings

Principle Duties

- Adhere to same day/ one day turnaround or Maximum completion date based on date assigned to Plan Document team:
    - Startup Plans three-day completion
    - Takeover Plan five-day completion
    - Amendments or restatements five-day completion
- Follow the Plan Document workflow tasks to track document progress
- Inquire with the Director of New Business, Plan Document Team Lead and/or Account Management to ensure Plan Document request response times are within MAP's client service & priority level
- Peer review of Plan Documents
- Cover team members assigned work when out of the office
- Escalate client issues to Team Lead or Director when necessary
- Acquire & seek direction only from the New Business Team regarding New Business Plan document requests; By no means should you take direction from an Advisor or Sales Personnel including Bob Chin
- Identify & recommend plan process enhancement to the Director Manger
- Participate in team meetings, compliance and/or projects as required

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 Plan Document Specialist 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, and as a team player.