Employee Job Description

Job Title: **Client Coordinator**
Department: **Retirement Services**
Reports To: **Practice Leader**
Employment Status: **Full-Time**
Exemption Status: **Exempt**

At Plexus Financial Services, we are dedicated to providing independent advice for retirement plans, assisting plan sponsors with their fiduciary obligations and helping participants to achieve their retirement goals. We advocate for our clients, delivering best-in-class solutions for their retirement planning needs and objectives.

Ideal candidates for the Client Coordinator opening will enjoy working in a collaborative, team-first culture. And they will be ambitious, as Plexus Financial Services is a wonderful place for associates looking to build a career, not just hold a job.

While a grasp of financial fundamentals is essential for the role, a pure finance background is not necessarily a requirement. We are looking for someone who is team-orientated, detail-focused and client-dedicated with a willingness to grow and the aptitude to learn.

SUMMARY

Responsible for providing high-level service delivery to PFS internal team, clients, intermediaries and other qualified referral sources and distribution channels. The position entails internal and external (client) communications, including participation in select client meetings; knowledge, understanding and application of fiduciary and investment principles; knowledge of investment systems (RPAG, Fi360, Morningstar specifically) for production of our quarterly and annual reports.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Manage multiple time sensitive tasks simultaneously for both internal and external clients.
- Assist team with account opening and closing forms/paperwork, preparation and mailing of client correspondence
- Coordinating marketing efforts and education meetings of 401k plans to selected vendors.
- Assist team in reviewing, analyzing and finding alternative funds using, RPAG, Fi360 reports and Morningstar and fund company materials
- Support PFS Team with preparation of presentation materials for meetings with clients.

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KNOWLEDGE, SKILLS AND ABILITIES

- A BA/BS degree or applicable experience
- Working knowledge of 401k plans and ERISA law (desired)
- Background in investment research and proficiency in working with RPAG, Fi360, and Morningstar software (desired)
- Intermediate knowledge of computer and word processing programs such as Microsoft Office Programs (Word, Excel, Outlook)
- Ability to communicate orally and in writing to others
- Ability to set priorities and reprioritize as required to manage work flow
- Ability to work independently from others with little or no supervision
- Ability to work in a team environment
- Ability to work well and keep a level head under times of stress
- Series 6 or 7 and 63 (or can obtain within 90 days) series 66 or 65 desirable.

LANGUAGE SKILLS

Ability to read, write and interpret retirement plan documents and compliance testing. Ability to speak and present effectively before small and large groups of people.

REASONING ABILITY

Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.

WORK ENVIRONMENT

Business casual office where the noise level in the work environment is usually moderate consisting of interaction with clients as well as other employees in the office.