



CREATIVE PLANNING

Title: ERISA Consultant

Location: Overland Park, KS or Remote

Job **JOB SUMMARY**

Description:

The ERISA client and legal practice consultant delivers high quality and efficient service to both internal and external stakeholders through strategic and project management of clients who have engaged the law firm for ERISA legal services. They work with client HR departments and management to ensure that ERISA legal engagements are executed in accordance with client engagement letters. They are responsible for day-to-day administrative services of the ERISA legal practice and assist the ERISA attorney in promoting the practice and developing new services.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

JOB DUTIES

- Maintain strong understanding of ERISA compliance; stay up to date with legislative and regulatory changes impacting the practice areas of focus
- Capable of performing legal research to obtain accurate information and being able to communicate this information to stakeholders in a practical manner
- Request and review legal engagement project materials; conduct plan administrative reviews including, but not limited to, compliance testing and plan documents. Use problem solving skills and in-depth product/benefit plan knowledge to successfully arrive at solutions that resolve complex client issues
- Assist ERISA attorney manage client relationships
 - Attend client and prospect meetings
 - Identify customer expectations and develop working relationships; assist in preparing client engagement letters to identify project deliverables
 - Manage project follow-ups with clients and with internal partners; assist in project stages from client intake to project completion and billing
 - Manage various projects simultaneously, while also maintaining an all-encompassing view of total workload within the practice

- Must be able to interact and communicate at ease with all levels within the client organization and to both internal and external client advisors & vendors via phone and email
- Provides administrative practice support to ERISA attorney
 - Evaluates current processes and actively looks for areas of improvement and efficiency
 - Prepares mailings to clients of documents and forms to be signed
 - Reviews and processes incoming signed documents and forms from clients
 - Responsible for client billing activities
- Other duties may be assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- B.A. or B.S. from an accredited university.
- 5+ years' experience in professional services, preferably in Retirement Plan Administration. Industry designation with ASPPA, NIPA, or similar organization not required, but a plus.
- Ability to comprehend, analyze and interpret retirement plan documents; must have advanced competency with Excel; experience with Ft. Williams pension software a plus
- Extremely detail-oriented and organized; effective problem-solving skills and an ownership mindset, including accomplishing tasks accurately, efficiently and in a timely manner.
- Exceptional verbal, written, interpersonal and collaboration skills
- Strong presentation and customer service skills