

Title: Consultant 1

Location: West Coast, USA

Job Description: **JOB SUMMARY**

The **Consultant 1** is responsible for delivering high-quality, efficient service to both internal and external clients through strategic and day-to-day management of a designated group of accounts. This includes maintaining a dedicated portfolio of core accounts and, when assigned, collaborating with a Senior Consultant and Team Lead.

The **Consultant 1** will continue to develop knowledge in retirement and investment, enhance consulting skills, and lead projects and client service teams for assigned clients. The role involves supporting client design and strategy needs with guidance from senior team members as required. Conversant in all aspects of client retirement plan and fiduciary process lifecycle and has an ability to lead a client committee meeting.

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

JOB DUTIES

- Manage projects as an individual contributor, ensuring accuracy and completeness of own work
- Provide leadership on tasks with oversight, delivering well-vetted recommendations for team and client consideration
- Maintain Salesforce records for assigned accounts
- Request client materials from Centralized Services, following the required protocols
- Review meeting materials provided by Centralized Services to ensure accuracy
- Attend and lead client meetings, coordinating with recordkeepers in advance as necessary
- Handle follow-up responsibilities, including preparation of meeting minutes, implementation of fund changes, and execution of match calculations
- Oversee client projects such as RFPs, M&A activity, and plan consolidations
- Support due diligence projects and strategic planning activities
- Seek oversight and assistance for complex tasks as needed

REQUIRED EXPERIENCE / QUALIFICATIONS

- B.A. or B.S. from an accredited university
- Series 65/66 license or ability to obtain within 90 days
- 3-5 years' experience in professional services, preferably in investment services
- Exceptional verbal, written, and interpersonal communication skills for effective internal and external communication
- Strong organizational abilities with high attention to detail
- Proven ability to handle competing tasks, with ongoing development in efficient and effective time management
- Ability to collaborate effectively with internal team members
- Receptiveness to constructive feedback and a growth-oriented mindset

- Experience in managing overall client relationships
- Confidence and consultative skills in presenting quarterly client materials to clients
- Developing skills in business expansion and client engagement

TECHNICAL SKILLS

- Understanding and previous use of Windows
- Proficiency in MS Word, Excel and PowerPoint
- Understanding of mobile operating systems such as Android or IOS
- Ability to adapt and integrate new technology quickly

Salary Range: \$80,000 - \$110,000