

Title: Retirement Operations Specialist

Location: Overland Park, Kansas

Job Description: **JOB SUMMARY**

The **Retirement Operations Specialist** will work alongside other specialists in supporting the functions of the Core retirement department. Those areas include but may not be limited to developing and maintaining prospect and client deliverables, sales support tasks, onboarding, data entry, and other projects as determined by business needs.

We do not accept resume submissions from third-party recruiters or staffing agencies.

Please contact our recruiting team directly

JOB DUTIES

- Effectively balance tasks with competing priorities and fluctuating volumes
- Conduct various projects simultaneously
- Prepare proposals, agreements, amendments, and exhibits based on templates
- Utilize Salesforce to keep client data clean and accurate
- Keep an open line of communication with all project stakeholders
- Evaluate feedback from stakeholders and implement a plan for areas of improvement and optimization
- Apply critical thinking to anticipate possible process breakdowns and solution ways to prevent them
- Remain focused under pressure and make decisions considering impact to client, colleague, and firm
- Must be able to interact and communicate at ease with all levels within the organization via phone, email, and/or in-person
- Other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- Bachelor's degree
- Intermediate to Advanced MS Office user
- Extremely detail-oriented
- Effective problem solving with minimal oversight

TECHNICAL SKILLS

- Salesforce experience a plus
- 2+ years' experience in professional services, preferably in investment services
- Ability to adapt and integrate new technology quickly
- Basic knowledge in investments, financial planning, and retirement plan design & compliance