

Employee Benefit Solutions, Inc.

Client Management Services (CMS)

Title: Associate, Health & Welfare
Reports to: Senior Associate, Health & Welfare
Supervise: None
Created: April 2006 **Revised:** October 2007

Job Summary

Provide support to Consulting teams in a fast-paced environment. An associate must have sound technical and organizational skills, a capacity to learn through experience, and a strong commitment to meet agreed upon timeframes and deadlines. The Associate position provides the opportunity to develop technical knowledge and management skills in order to build a career in professional advisory services for corporate health and welfare programs.

Responsibilities

- Maintain structure and legal disclosures for qualified and nonqualified health and welfare programs
- Prepare 5500 government filings
- Update monthly/quarterly financial statements
- Assist in underwriting and projections for annual budgets
- Prepare Requests for Proposals (RFP) for market and perform analysis of submissions
- Draft presentations and reports
- Assist with project and implementation plans
- Maintain day-to-day relationships with vendors
- Research and develop solutions for client issues
- Assist in drafting business letters and provide technical review of employee communications
- Prepare client income budgets
- Participate in PATH to Performance
- Adhere to quality assurance process
- Perform special projects as assigned

Minimum Requirements

- College degree or equivalent educational training or business experience

KSA (Knowledge, Skills, Abilities)

- Intermediate Outlook, Word, Excel, and PowerPoint
- Beginner Access and Project
- Able to handle confidential information with maximum discretion
- Able to multi-task, prioritize, and be flexible to meet deadlines
- Able to work independently and in a team environment
- Detail oriented, organized, and efficient
- Excellent interpersonal/presentation skills

- Excellent written/verbal communication skills
- Knowledge of federal and state regulations
- Strong analytical and quantitative skills

Special Requirements

- Travel (as needed)

Disclaimer

The above statements are intended to describe the general nature and level of work being performed by people assigned to this classification. They are not to be construed as an exhaustive list of all responsibilities, duties, and skills required of personnel so classified. All personnel may be required to perform duties outside of their normal responsibilities from time to time, as needed.