



- Equip direct client contact with the tools and knowledge to effectively communicate benefits issues to senior management, board of directors, etc. - assist client in this communication as appropriate
- Assist in development of benefit communication strategy and communication pieces

**Vendor Management:**

- Escalate and resolve major issues as necessary
- Facilitate clients' decisions to retain or change vendors

**New Business Development:**

- Identify new business opportunities and strategies
- Draft proposal and engagement letters defining services to be provided
- Develop appropriate EBS fee schedules
- Develop strategies and lead client merger and acquisition initiatives

**Minimum Requirements**

- College degree or equivalent educational training or business experience
- 3 years supervisory experience
- 7 years qualified plan/investment management experience

**KSA (Knowledge, Skills, Abilities)**

- Intermediate Word and Excel skills
- Able to generate innovative insights from analysis and drive to actionable results
- Able to handle confidential information with maximum discretion
- Able to manage projects, multi-task, prioritize, and be flexible to meet deadlines
- Able to train/coach others
- Able to work independently and in a team environment
- Delegation skills
- 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.