# Employee Benefit Solutions, Inc.
## Client Management Services (CMS)

| | | | |
|---|---|---|---|
| **Title:** | Senior Associate, Assimilation | | |
| **Reports to:** | Managing Consultant, Assimilation | | |
| **Supervise:** | Associate, Assimilation | | |
| **Created:** | April 2006 | **Revised:** | August 2008 |

**Job Summary**

Provide support to Consulting teams in a fast-paced, evolving environment while maintaining a high standard of professionalism and quality of work. A Senior Associate must possess a strong sense of commitment, drive, and enthusiasm. These qualities coupled with agility will serve as a foundation for furthering the career of a professional advisor.

**Responsibilities**

- Confirm that broker of record letters, business associate agreements, and authorization letters are executed, stored electronically, and communicated with the appropriate internal parties
- Organize and attend baseline kick-off meeting with new client
- Develop and manage project and implementation plans
- Manage the collection of new client documentation and data
- Evaluate plan designs, contract features, and vendors
- Evaluate insurance policies, contracts, and vendor agreements
- Review and confirm ERISA plan structure
- Evaluate H&W and retirement plans for compliance with federal and state regulations and document any needs or gaps in compliance
- Identify and quantify strategic plan changes
- Review client income budget and fee disclosure
- Prepare underwriting model and cost projections for H&W plans
- Confirm and evaluate 401(k) fee and investment portfolio analysis
- Assist in developing and presenting client baseline and analysis reports
- Manage M&A/integration projects
- Manage Requests for Proposal (RFPs) initiatives and analysis of submissions for all types of H&W and retirement plans
- Review and confirm vendor letters of agreement
- Assist in managing new plan implementations
- Maintain day-to-day client relationships
- Develop and present solutions for client issues
- Manage vendor relationships
- Coordinate and collaborate with ongoing client management team (H&W and/or retirement) as well as all other lines of business involved with the new client
- Document time in Tool Time
- Supervise, train, develop and mentor direct reports

- Provide input and responsible for PATH evaluations
- Maximize intellectual capital as Subject Matter Expert (SME)
- Adhere to quality assurance process
- Perform special projects as assigned

**Minimum Requirements**

- College degree or equivalent educational training or business experience
- Demonstrated supervisory skills and abilities
- 3-5 years benefits/HR experience

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

- Advanced Excel
- Intermediate Outlook, Word, 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 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
- Facilitate meetings
- Knowledge of federal and state regulations
- Project management
- 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.