

Title: 316 Administrator

Location: Ohio or Charlotte

Job Summary: Administrator provides support and works directly with assigned Account Manager(s). This position requires excellent analytical abilities, attention to detail, accuracy and problem solving ability. The position requires the ability to maintain high levels of confidentiality and the ability to work as part of a team, while independently managing accounts with minimal required supervision. Excellent communication skills and a full understanding of the importance of customer service is a must.

Responsibilities:

- Responsible for tracking and monitoring progress and ensuring necessary year-end data is requested and received from the client in order to meet compliance deadlines.
 - Submitting year-end data requests to clients and/or their advisor
 - Reviewing year-end data submitted for missing information
 - Requesting missing year-end data
 - Importing census and contribution information into Relius
 - Run eligibility transaction in Relius
 - Downloading various TPA year-end investment information from vendor websites
 - Preparing payroll splits for client's contribution deposits
 - Allocate plan contributions; gain/loss; transfers and loan repayments in Relius
 - Reconciling contributions reported by employer with contributions deposited at vendor
 - Print plan reports and participant statements
 - Prepare vesting uploads for various vendors
 - Maintain effective relationships with client and advisor contacts
 - Ensure deadlines are identified and met.
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- **316 Responsibilities:**
 - Assists Account Manager with force-out distribution project and tracks timing of when distributions can be processed through record-keeper.
 - Responsible for importing into Pension Pro the annual census and payroll data the 3(16) team downloads and saves in the client's applicable valuation folder.

- Upon request from 3(16) Support Team, responsible for obtaining participant email addresses for electronic notice delivery. Administrator requests from client and gives deadline of 48 hours to obtain the information in excel file.

Requirements:

- Excellent verbal and written communication skills
- Knowledge of Excel and other Microsoft applications/software
- Excellent math skills
- Strong analytical and problem solving skills
- Provide a high level of service to clients
- Relius a plus