

Watkins Ross

Junior Retirement Plan Administrator

Watkins Ross is a 100% employee-owned actuarial and retirement plan consulting firm located in Grand Rapids, MI. As a 100% employee-owned firm, we recognize our employees are our greatest assets. Our team includes a diverse set of experienced professionals who help our clients achieve their goals by providing services to help them implement successful retirement programs, recognize emerging trends and understand regulatory changes that may impact their bottom line. Are you looking to join our team of employee owners? We are currently seeking a Junior Retirement Plan Administrator. Send your resume to careers@watkinsross.com for consideration.

What makes Watkins Ross unique? Our culture, our benefits and our city. Read more at www.watkinsross.com/careers.

Overview

The Junior Retirement Plan Administrator will assist the defined contribution (DC) department with processing the 400 DC plans we administer. This is an entry level position with the opportunity to grow into the role as the primary contact relating to plan administration and consulting for an assigned group of 401(k) profit sharing plans. This position reports to the DC Manager and will work under the guidance of an experienced Retirement Plan Administrator.

Job Responsibilities

- Process distributions, loans, hardships and in-service withdrawals
- Prepare census requests and audits
- Prepare the year-end data for processing
- Prepare client engagement letters and participant fee disclosures
- Prepare 1099R Forms
- Assemble valuation reports
- Assist with additional administrative tasks as needed (scanning, filing, etc.)

As the Junior Retirement Plan Administrator advances through training, the job responsibilities will also include:

- Respond to general inquiries from clients/advisors
- Prepare Form 5500 filings and related schedules
- Collect year-end data from fund companies for valuation work
- Assist with special projects as needed

Skills and Qualifications

The ideal candidate is resourceful and self-directed, with the ability to work cohesively as a team. Strong communication skills, attention to detail and the ability to multitask are essential to handle the multiple responsibilities in our technical industry. This individual must be highly organized with an enthusiastic, customer service oriented attitude and motivated to learn pension law and regulations.

- Excellent Microsoft Office skills **required**. Working experience with Relius preferred.
- Bachelor's degree in an analytical field or equivalent work experience preferred.
- One year of defined contribution administration experience preferred.

