PlanTech, LLP is a fast-growing third party administration firm that provides comprehensive consulting, design, implementation, and administration of all types of retirement plans that support our clients' bottom line and enable business owners and employees to maximize retirement savings.

We simplify and manage the myriad of retirement plans available so our clients can focus on their core business. Our services include:

- Design and implementation of retirement plans;
- Annual administration and monitoring of ERISA, DOL and IRS laws, discrimination testing, determination and verification of eligibility and contribution allocations, reporting and completion of annual tax returns;
- Consultation services.

Overview

The Retirement Plan Administrator is responsible for all aspects of defined contribution and defined benefit plan administration, including 401(k), profit sharing, Cash Balance and Cross Tested plans. This role is responsible for ensuring that clients are in compliance with laws governing qualified retirement plans.

Responsibilities

- Reconciliation of trust assets;
- Calculation and allocation of contributions, including pro rata, integrated, cross-tested, and matching contributions;
- Perform compliance testing, including ADP/ACP, coverage, and average benefits;
- Preparation of plan reports;
- Preparation of Forms 5500 and Forms 1099-R;
- Preparation of participant loan and distribution packages;
- Work closely with clients in an effort to obtain necessary data;
- Respond to client requests in a timely manner;
- Participate in continuing education/training in order to keep current with the changing laws and regulations related to defined contribution plans;
- Other projects and duties as assigned.

Education/Skills/Experience

- Minimum 2-3 years of retirement plan administration experience and some customer service experience;

- Knowledge of laws related to qualified retirement plans;
- Ability to read and interpret plan documents;
- Must have strong bookkeeping and organizational skills, and a demonstrated keen attention to detail;
- Excellent written and verbal communications skills and customer service skills required. Must have a demonstrated ability to be responsive and maintain strong client relations;
- A demonstrated ability to self-direct, self-motivate, and effectively organize client engagements, required. Must be able to manage multiple priorities, and thrive in a deadline driven environment with frequently changing priorities;
- Proficiency with basic software programs, including Microsoft applications (Word, Excel, Outlook) required;
- Experience with FT Williams, Relius Administration or similar pension software preferred.

The ideal candidate should be a team player and have a strong desire to learn and grow within the position. This job is available via telecommute.

PlanTech, LLP offers a highly competitive benefits and compensation package to all employees. Please submit your resume and cover letter to kathy@plantech-online.com.

PlanTech, LLP is an Equal Opportunity Employer.