

Retirement Plan Participant Education

Ancora is seeking a retirement plan educator whose primary job function is to provide education, enrollment support and advice to plan participants and employees of our qualified retirement plan clients. This person will serve as the primary contact responsible for the delivery of services to retirement plan participants to help them prepare for a successful retirement. They will consult with clients and internal partners to determine the appropriate delivery method to provide initial and ongoing engagement and support for plan participants.

This individual will be on the client-facing relationship team and be a trusted advisor to the clients that they serve.

Location

This position is located at Ancora's Cleveland (Mayfield Heights), Ohio, office. No remote option.

Duties & Responsibilities

- › Coordinate and conduct group education meetings for participants (both virtually and in-person)
- › Coordinate and conduct group enrollment meetings for employees (both virtually and in-person)
- › Coordinate and conduct one-on-one meetings with participants (both virtually and in-person)
- › Provide guidance and assistance to participants on the various planning tools available on each of the recordkeeper platform websites utilized by clients
- › Maintain relationships with clients and participants and answer questions, provide updates and advice as needed
- › Develop and maintain trusted relationships with the clients you service
- › Respond accurately and efficiently to client needs and questions
- › Work collaboratively with the Retirement Plans team and relationship managers to provide support to existing clients and new prospects
- › Work collaboratively with the Retirement Plans team to maximize efficiency of service to our clients
- › Develop a system of organization for keeping up-to-date on client engagement needs and necessary/timely follow-up
- › Create, prepare and distribute other client or department reporting as needed
- › Other duties as assigned

Qualifications

- › Bachelor's Degree or higher education, required
- › 3+ years of Retirement Plan service experience or 3+ years K-12 teaching experience
- › Work experience in a client facing role
- › FINRA Series 7 preferred
- › Working knowledge of Microsoft Office software
- › Ethical standards and principles
- › Excellent verbal communication skills
- › Ability to communicate professionally and across multiple functions throughout the organization
- › High degree of organizational skills, accuracy and attention to detail
- › Working knowledge of relevant regulatory, economic and political environments
- › Strong desire to maintain and foster ongoing expertise in relevant areas of professional education
- › Ability to multi-task
- › Self-starter with a strong work ethic
- › Team-oriented
- › Ability to complete work/projects accurately and on time
- › Ability to follow organizational policies and procedures
- › Professional appearance and demeanor

Benefits

Ancora offers a competitive salary and excellent benefit package with a culture of teamwork and recognition.

About Ancora

Ancora is client-focused and growth-oriented investment and financial advisory firm based in Cleveland, Ohio. The Firm is recognized for providing investment advisory, money management, insurance and retirement plan advisory services to individuals and institutions. Ancora promotes a friendly, family-oriented work environment and encourages our employees to strive for personal and professional growth with the highest level of integrity.

Ancora is an Equal Opportunity Employer

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, protected veteran status, disability, or any other basis protected by applicable law.

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