

Retirement Plan Operations Professional

Ancora Retirement Plan Advisors (RPA) is seeking a retirement plans operations professional to join the team. This person will serve as the primary contact for plan sponsors, recordkeepers and third-party administrators, while servicing Ancora's over 200 retirement plan clients, totaling over \$1.3 Billion in combined plan assets and more than 17,000 plan participants.

Location

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

Duties & Responsibilities

- › Responsible for the onboarding, ongoing service and support of retirement plan clients
- › Interact with and provide retirement plan support to Ancora clients at the plan level, including business owners, CFOs and HR professionals
- › Act as the liaison between clients and 401(k) recordkeepers (i.e., Fidelity, Voya, Ascensus)
- › Work with recordkeepers and third-party administrators to ensure plans are running properly, participating in discussions, gathering information, answering questions, coordinating calls and overseeing processes from start to finish
- › Execute operational workflows in CRM system to support client and departmental needs, as necessary
- › Work internally with Ancora's finance department to ensure that RPA revenue is flowing to firm properly; provide supporting documentation to deposits, review deposit variances versus fees received, contact recordkeeper and/or client if funds are not received to request payment and help clients understand advisor fee calculations
- › Support Ancora Relationship Managers and help win new business by attending meetings with prospective clients to showcase what Ancora can do operationally

Qualifications

- › Bachelor's degree in Business or related field
- › 5+ years' work experience in retirement plan operations (at an investment advisory firm, recordkeeper or third-party administrator)
- › CRM experience preferred. Microsoft Dynamics experience a plus
- › Strong working knowledge of Microsoft Office applications and general PC skills
- › High ethical standards and ability to maintain confidentiality while following organizational policies and procedures
- › Team-oriented with effective interpersonal communication skills and a desire to learn and help others
- › Highly organized and accountable with attention to detail and accuracy
- › Ability to multi-task with a strong work ethic
- › 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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Apply

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