



PENSION
consultants inc.

Investment Services Administrative Assistant

You:

Love helping people attain their goals

Feel the financial industry needs a good cleaning

Believe in getting the little things right leads to getting the big things right

Own your own successes and mistakes

Are always learning

We:

Work to improve the financial security of the American worker

Are performance driven

Believe professionalism leaves no room for conflicts of interest

Have been consistently recognized as one of the top retirement plan managers in the nation

Care more about your intelligence and values than your experience

Overall Purpose:

The Administrative Assistant is under direct supervision and has limited decision making authority in fulfilling accountabilities. This position facilitates the smooth functionality of the Investment Services department while adhering to regulatory requirements and our policies and procedures. Responsibilities will include, but are not limited to, clerical, data entry, filing, and project based work as needed.

Duties & Responsibilities:

Primary

- Pursue the purpose of the firm and demonstrate the core values in all interactions with stakeholders of the firm and the public.
- Relentlessly exhibit high performance standards when conducting business for PCI.

Administration

- Research and understand outside vendors' policies, and procedures regarding investment related transactions.

- Administration of investment related transactions with outside vendors.
- Manage the communication and coordination of investment transactions with clients.
- Ability to build and maintain relationships with outside vendors.
- Assist in maintaining the integrity of our client and participant database.
- Prepare and deliver internal reports weekly.
- Provide administrative assistance to the Investment Services department as needed in the form of preparing correspondence, binding, etc.

The above statements are intended to describe the general nature and level of work performed by employees within this position. It is not designed to contain or be interpreted as a comprehensive list of all duties, responsibilities and qualifications required of the employee assigned to this job.

Skills

- Detail oriented, unwavering in quality of work produced
- Proficient in Microsoft Office software products (Excel, Word, Outlook, and CRM Dynamics).
- Demonstrated ability to follow projects through to successful conclusion.
- Ability to work independently and prioritize workflow
- Excellent communication skills, both verbal and written.

Experience & Education

- High School Degree.
- Minimum 3 years work-related experience.