



PENSION

consultants inc.

JOB DESCRIPTION

Position:

Operations Administrative Assistant

Department:

Operations

Reports To:

Director of Operations & Finance

Incentive Plan:

This position has an incentive plan based upon both objective measurements and subjective criteria.

(Job Posting)

You:

Feel the financial industry needs a good cleaning

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

Take responsibility and own your own successes and mistakes

Enjoy the process of pursuing excellence as much as the results

We:

Relentlessly pursue improving the financial security of the American worker

Are performance driven

Believe professionalism requires bold and complete transparency

Care more about your talent, values, and performance than your experience

Overall Purpose:

The Operations Administrative Assistant is the initial contact for all clients and guests of the firm. This position is responsible for portraying the firm in a professional and welcoming manner at all times. Responsibilities will include, but are not limited to, clerical, receptionist, data entry, facilities coordinator, loft rental management, system management, project-based work as needed and maintaining the general office appearance of Pension Consultants, Inc.

Essential Functions:

- Pursue the Purpose of the firm and demonstrate the Values in all work-related activities.

- Interact with incoming callers and visitors to the office in a friendly and professional manner. It is the responsibility of the OAA be in the assigned work area 90% of the time.
- Display a subject matter knowledge of the Microsoft CRM Dynamics software.
- Thrive in a fast-paced work environment and the ability to multi-task without compromising quality.
- Responsible for Microsoft CRM Dynamics data entry including but not limited to, account and engagement establishment, billing contact updates, consultant assignments, client termination.
- Process all incoming and outgoing mail in accordance with Firm Policy.
- Actively participate in invoicing process including but not limited to running and distribution of client reports, emailing client documents, scanning and storing documents in client files.
- Responsible for creating, updating, and maintaining physical and electronic client files in accordance with all relative policies and procedures (P&P).
- Prepare and deliver internal reports, client facing reports, and filing reports submitted to clients while adhering to deadlines.
- Responsible for the sending accurate internal Key Performance Indicator (KPI) charts weekly and updating KPI monitors daily.
- Provide administrative assistance to the department as needed including but not limited to, updating files, preparing correspondence, binding, creating labels, filing, etc.
- Maintain firm Gift Log and blotters.
- Assist in new employee onboarding process where appropriate.
- Proactively monitor resource calendars, company fleet, equipment, and building for maintenance/repairs, coordinate maintenance/repairs with service providers, and maintain facilities maintenance records, periodically checking service providers for competitive prices and quality.
- Periodically update Director on status of office and kitchen supply inventory.
- Assist Director with loft rentals as the contact for primary tenant, prospective tenant, and lease advertising contact, record keeper, and facilities manager.
- Assist Compliance with distribution of firm policies and procedure as needed.
- Provide coordination as needed between staff and IT vendors.
- Assist as needed with hardware/software purchases, license renewals, updates/upgrades, and maintenance of the resource log.
- Be available for overtime during each quarterly invoicing period or as needed.
- Perform additional projects as assigned by Director.
- Be a thought leader in the area of operations.

Talents

Striving Talents

- Achiever: A drive that is internal, constant, and self-imposed
- Ethics: A clear understanding of right and wrong which guides your actions

Thinking Talents

- Responsibility: A need to assume personal accountability for your work
- Arranger: An ability to orchestrate
- Problem Solving: An ability to think things through with incomplete data

Relating Talents

- Multirelator: An ability to build an extensive network of acquaintances
- Team: A need to build feelings of mutual support
- Positivity: A need to look on the bright side

Skills & Abilities:

- Excellent communication skills, both verbal and written.
- Proficient in Microsoft Office software products, primarily with Excel, Word, Outlook, and CRM Dynamics.
- Demonstrated ability to follow projects through to successful completion while adhering to deadlines.

- Seeks to reduce operating costs without sacrificing quality.

Knowledge, Experience & Education

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

About Pension Consultants, Inc.

Pension Consultants, Inc. is committed to providing superior plan performance of the key drivers in retirement readiness so our clients can make a positive impact in the lives of participants. Since 1994, we have been offering in-depth, unconflicted advice on every aspect of retirement plan management, and serve companies of all sizes in a variety of industries across the United States.

Pension Consultants, Inc.
300 S. Campbell Ave.
Springfield, MO. 65806
www.pension-consultants.com

All non-licensed employees of Pension Consultants are prohibited from providing general or specific advice, analysis, or recommendations regarding securities or securities markets.

Approved by:

Team Director: _____

Date: _____

CCO: _____

Date: _____

I have received, reviewed and full understand the job description, I further understand that I am responsible for the satisfactory execution of the essential functions described therein, under any and all conditions as described.

Employee signature: _____

Date: _____