Client Special Services – Team Leader

Candidate Requirements:

1) Exempt Full Time Position
2) 8-10 years of related work experience with a minimum of 5 years as an Administrator with direct client contact
3) Obtained or working towards an approved professional designation
4) Ability to perform all functions of Employee Benefits Administrator Job Description
5) High attention to detail
6) Driven by and able to meet deadlines
   a) Busy season during January through April, overtime expected
7) Ability to take on a consulting role as it relates to recognizing potential situations, evaluating those situations and make recommendations to enhance customer service
8) Ability to manage multiple projects
9) Demonstrated ability to make discretionary decisions related to client needs
10) Ability to supervise staff and/or assist in monitoring and provide guidance to assistants or employee benefits administrators I and II work flow of team members to ensure servicing standards are being met
11) Strong verbal and written communication skills
12) Time management skills
13) Position requires confidentiality for all client and employee related information
14) Proficient with software
    a) Word
    b) Excel
    c) GoldMine software (client contact system)
    d) Relius

Position Responsibilities:

1) Coordinates the Conversion for Administration of takeover or new plans (Brokerage) with other members of Takeover Team, including Primary Administrator, DocDesign, Brokerage Firms and Previous TPA firms and client. Attend handoff calls initiated by the Primary Administrator.

2) Responsible for the set up of administration in Relius for new and takeover plans. Works with the PA to gather information necessary and get plan ready for first administration.

3) Prepares initial plan termination letter or reverse takeover letter. Coordinate with Investments, the Primary Administrator, DocDesign and consultants to complete the process of the terminating plan or relationship, including, but not limited to the transfer or distribution of plan assets.

4) Work with DocDesign to complete any required IRS and PBGC filings that may be requested by the client upon termination of the plan. Prepare interim and final Form 5500 for terminating plans.

5) Prepare contribution calculations and compliance testing for terminating plans making a final contribution. Communicate with client, CPA and consultant regarding the contribution calculation and options available while ensuring all compliance testing requirements met.

6) Monitor client deadlines and expectations and ensure timing requirements are met. Update KBC tracking spreadsheets as requested by mangers to track status of workflow. Request and interpret client prepared annual reports and follow-up with the client as necessary for incomplete data.

7) Supervise other members of Special Client Services Team to ensure other team processing tasks are completed timely and in accordance with KBC service standards, including, but not limited to distribution/withdraw forms, loan initiations, distribution processing and 3(16) mailing services.

8) Complete other duties as assigned by Manager.

9) Monitor client deadlines and expectations to ensure procedures are being followed and timing requirements are met for team. Work with manager on any performance issues. Document items and work with HR to determine if and/or when Performance Improvement Program is necessary.

10) Responsible for reviewing timesheets for non-exempt team members to ensure accurate per week hours are being reported. Coordinate PTO with department manager to ensure overall team coverage.

11) Responsible for drafting annual reviews and providing to manager to add comments. Reviews will be conducted jointly by Team Leader and Manager. Responsible for assisting Department Manager in skill development of team members by keeping manager informed of any issues or concerns. Working with department manager and HR, create an individualized plan for each employee on your team that develops them to their highest potential on the career path with Kidder Benefits. Document any contributions made by your team members that you feel should be recognized/rewarded, i.e. change in process or procedures that resulted in time saved, etc..and report to HR.

Role within Kidder Benefits Consultants:

Kidder Benefits Consultants, Inc.(KBC) is in the information delivery business. This type of business will succeed only if the level of service and communication exceeds that of its competitors and satisfies client needs. To better serve our clients we have set certain service standards regarding the timeliness of providing our information. We have also set certain service standards regarding the level and type of communication to clients, CPAs and centers. The role of Client Special Services Team Leader is to provide outstanding customer service including the delivery and communication of the information within our service standards. The role of this position is imperative to ensuring that we meet our service standards, exceed the expectations of our clients, and ensure the continued success and growth of KBC.

For more information or to apply, contact:

Ada Zimmerman, Manager – HR
Kidder Benefits Consultants, Inc.
5700 Westown Parkway, Suite 100
West Des Moines, IA 50266

Phone: 515-254-1178
Email: azimmerman@askkidder.com