Jumet FINANCIAL

Let's build your future together!

621 7th Avenue, Beaver Falls, PA 15010
www.jumetfinacial.com
724-944-0159

Retirement Plan Consultant – Full Time

Jumet Financial is committed to providing our clients with well-informed, objective advice, and to create a disciplined framework within which financial decisions are made, implemented, and managed from generation to generation. Jumet Financial is seeking a highly efficient and detail-oriented individual with the same strong standards for the role of Retirement Plan Consultant with the potential to grow into Retirement Plan Advisor. The position requires a high level of confidentiality and professionalism, excellent time and project management skills and the ability to manage multiple work streams (both internal and external) at once. The qualified candidate must show high regard for client needs and not only be efficient, but also build rapport with current clients and prospective clients. The individual will have a desire to continue their education and skill development toward managing and building a Retirement Plan Team.

Primary Duties and Responsibilities:

- Assist with the communication and administrative duties involved in the onboarding of new 401k plans.
- Deliver outstanding client service, relating to general client support and answering general questions about accounts as needed
- Participate in team meetings and support staff meetings – in particular those involving the ongoing development and support of the 401k division.
- Aid in the growth and development of our 401(k) Branch
- Engage with newly eligible participants, to encourage enrollment, provide financial education, and discuss broader financial planning
- Be proactive in reaching out to currently participating employees, to provide continuous education and guidance in their 401k plan
- Review plan data to assure ongoing compliance and testing adherence
- Help to perform tasks necessary to the ongoing maintenance of the plan, including plan force out events and investment performance reviews
- Visit the onsite location of plan sponsor(s), to further encourage participant enrollment and provide plan education
- Other assigned duties from management
- Assist Individual Advisors

Qualifications:

- Associates or Bachelors degree in progress or in a finance related field and willingness to continue education towards certifications and/or advanced degrees
- Strong passion to work in and succeed in the financial industry
- Willingness to obtain various securities and insurance registrations (upon request)
- Excellent Computer skills (MS Word, Excel, PowerPoint, and Outlook)
- Excellent communication skills (spelling, grammar and proofreading) written skills and verbal skills
- Excellent organizational and time management skills
- Ability to prioritize and multi-task
- Ability to exercise confidentiality and discretion

Eligible candidates will be required to pass a thorough background check.

All qualified candidates should contact Mallory Romano at 814-525-7063 or email resumes to mallory.romano@jumetfinancial.com